University of Alberta

Changing Understandings of Equity: Alberta's Funding of Public Education (1970 to 2000)

by

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Abstract

Public education in Alberta experienced a number of changes in equity that affected students and taxpayers. This study explores those changes between 1970 and 2000, including the Alberta government's understanding of equity and what elements influenced its understanding and decisions about equity. How the research may influence the future was also considered

To better understand equity in Alberta's public education system and how it might have evolved, three approaches were used for data collection. First, Alberta Department of Education documents were reviewed; second, *Hansard*, the official record of the Alberta Legislative proceedings, was reviewed; and third, interviews were conducted with government officials: former Ministers of Education, a Minister of Municipal Affairs, four Deputy Ministers, and five other government-appointed officials.

By defining themes found in the data, further analysis revealed issues related to these themes. First, the themes were policy, legislation, court decisions, equal educational opportunity, and fiscal equity. Second, within these themes, the issues were Roman Catholic separate schools, special-needs students, funding equity between grade levels, teacher certification, sparsity and distance, minority language, corporate pooling, school foundation funding, supplementary funding, and differentiated funding.

It was learned that the objective of fairness did not change in the pursuit of equity; however, the methods did. Further, the Ministers of Education brought their perspectives to the education portfolio and addressed equity through different approaches and emphasis. Their success at achieving their goals often depended on their

political circumstances as well as the support within their caucus, department, and the Legislative Assembly. The public, business, local governments, and special lobby groups had varying influence depending on the minister and the political circumstances.

Trends over the 30 years of the study appear to be repeating as the research was being completed. The model that was in place just prior to 2004 looks very similar to the one in place just prior to the PCs' coming to power in 1971. If the cycle is repeating, then reviewing this research may provide some direction as to where the Department may go in the future in its pursuit of improved equity, particularly for students.

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CHAPTER ONE:

INTRODUCTION

Orientation to the Study

It is an understatement to say that public education has changed in the Province of Alberta over the last 30 years. Change has been a reality in aspects of education including curriculum, technology, delivery of instruction, governance, and funding. In particular, the governance and funding of education in Alberta have changed markedly since the 1993 provincial election, and these changes have affected equity for both the student and the taxpayer. Prior to 1993 the Social Credit[1] and Progressive Conservative[2] governments of Alberta had discussed similar changes to those introduced by the Klein PC government. Although these issues had been discussed prior to 1993, neither the Socred nor the PC government to that date had seen the need or had been interested in making the changes that the Klein PCs enacted following their election in 1993.

The main issues in the 1993 Alberta provincial election that brought the Klein PCs to power were debt reduction and fiscal restraint. Early in 1993 the Klein PC government set out to act upon its new mandate. The government rapidly made major changes in the governance and funding of public education with apparent public support. Two years later Webber (1995) wrote, "Alberta, Canada, is the site of large-scale educational change initiatives legislated by the provincial government" (p. 1). Such significant changes, it may be argued, had not been made in education since the Socred party was first elected in 1935. Wagner (1998) echoed this observation, although he argued that the changes began with the Lougheed PC government in 1971. He stated, "The changes that began with Lougheed represent the most significant government efforts in the area of education policy since Aberhart was Education Minister" (p. 20). The PC government in 1971 addressed equal educational opportunity early in its mandate (e.g., equal opportunity for students, especially special-needs students). The department documents in the 1970s that spoke of *equal educational opportunity* in public education moved to the term *equity* early in the 1980s. Although the terms are not synonymous, they are closely linked.

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[1] Social Credit was a political party that held power in the Alberta Legislature from 1935 to 1971. In this study it is referred to by the common term *Socred* for brevity.

[2] Progressive Conservative is a political party that has held power in the Albert Legislature from 1971 until the time of this study. In this study it is referred to by the common term *PC* for brevity.

As public education has evolved, the understanding and application of the concepts of equal educational opportunity and fiscal equity in public education have changed in Alberta. Are these changes significant, or have they essentially remained the same since 1971 when the Lougheed PCs first came to power in Alberta? This question was "sparked" for me by an article in the *Edmonton Journal* (Heyman, 1999) in the autumn of 1999 that said that changes made to financing public education in 1995 influenced the ability of the Calgary Board of Education (CBE; see Appendix A for a list of the acronyms used in this dissertation) to respond to the educational needs of its students. Heyman stated that the CBE had "lost millions of dollars when the Alberta government changed its funding formula in 1995 . . . [and] claims the school board's funding was $96 million less than it would have been if the government had left education funding alone" (p. B10). The CBE reported a deficit of $20 million when other school boards that had previously experienced financial difficulty showed surpluses in 1999 (Olson, 1999). The Klein government's changes in funding formulas for education appeared to have altered the financial abilities of school boards to provide educational programs for students in their jurisdictions and may have changed the equity that students experienced.

Wagner (1998, p. 120) said that the restructuring initiatives, although having a significant impact on governance for local school boards, were not based on new ideas, but on directions established long before the changes brought about by the Klein PC government in 1994-1995. Some may argue that Wagner's conclusion was inaccurate, inasmuch as changes occurred in government thinking over the course of the PCs' time in power from 1971 to 2000. The changes in educational governance were not the only changes made; they were accompanied by changes in the financing of education. *Fiscal equality*, *fiscal equity*, and *student equity* are terms in the government documents that speak to the changes made in education in both 1994 and 1995. What was the thinking of the Klein government on fiscal equity/equality and student equity during this change in 1994-1995? Was it consistent with the thinking leading up to 1995 from the time that the Lougheed PCs first came to power in 1971? Did the government's thinking change between 1971 and 2000?

Significance of the Study

Manzer (1994) stated, "[The] stakes in power struggles [over] public schools are not only objects of domination and products of compromise, they are potentially agencies for creating political consensus" (p. 3). When researchers have considered the topic of fiscal equity and equal educational opportunity in education, they have often statistically analyzed the funding arrangements over periods of time; five years, for example. Such analysis measures the success of related policy changes. In this study I did not propose such a short time span; neither did I propose a specific statistical analysis of the revenues and expenditures of Alberta school jurisdictions. Rather, I explored the development of the concepts of equal educational opportunity and fiscal equity from the period 1970 to 2000. Discussion was based on recollections of those individuals who made the decisions that brought about the changes to school finance policies and regulations. In addition, the relevant documents found in government, such as *Hansard* and annual reports of the Department of Education,[3] were relied on to corroborate and illuminate the recollections of the individuals interviewed.

For the most part, there is usually only the written record to consider in studying equal educational opportunity and fiscal equity in public education since Canada became a nation. This places limitations on any study of this nature; however, if it is possible to gain the knowledge through personal interviews of the people who participated in policy decisions, an added richness of understanding may occur because the reasons behind the decisions that affect equality and equity may be better explained. At the time that I conducted the research, not only were the documents from the PC government from 1970 to 2000 relatively easy to access, but the key individual players were also still available for interview to provide a rich understanding of the events and thinking that encouraged and initiated changes. With this perspective, looking back through the eyes of the key players, this research may better inform future decisions concerning educational fiscal equity.

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[3] The Alberta Department of Education is referred to in this study, in short, as *the Department*. It was referred to as the Department of Education prior to 1973, when its name changed to Alberta Education. The name remained the same until 1999, when it changed to Alberta Learning, and then in 2004 the name changed back to Alberta Education. When I have referred to another department, I have given the full name; for example, the Department of Municipal Affairs.

The study provides knowledge about how and why equal educational opportunity and fiscal equity developed as they did in Alberta and notes solutions and problems and what may need to happen in the future to achieve an improved level of fiscal equity in public education. This is a longitudinal policy analysis. Policy typically results from public discussion that results from a variety of pressures brought to bear on the public or other interests. Manzer (1994) stated that

> one approach to studying political ideas and public policies examines the importance of political ideas as causal determinants of public policies. Policies here are seen as results or outcomes of political actions. They can be explained by a range of causal factors, which include the distribution of power among participants in policy-making, organization of political interests, structure of institutional constraints, and influences of socio-economic environment. (pp. 4-5)

This study is significant because through interviews I sought out the key players who established, maintained, and implemented educational policy that affected equal educational opportunity and fiscal equity from 1970 until 2000. In addition, I reviewed the various public documents that speak to these policies. Therefore, understanding the changes through such sources will reveal the past and propose where we may go in the future with respect to educational fiscal equity in the Province of Alberta.

Statement of the Problem

Purpose of the Study

Equal educational opportunity, often called equity for students in public schools, has been an elusive but desirable goal for the Department since at least 1961 when the School Foundation Program was established. Provincial governments (referred to as *governments* in this study) have made several attempts since 1961 to address the unsatisfactory levels of equity for students across the Province of Alberta. Adjustments have continued to be made to improve fiscal equity. This suggests that a perfect long-term formula had yet to be reached.

The first purpose of this study was to follow the evolution of equal educational opportunity and fiscal equity in public school funding from 1970 to 2000. The second purpose was to gain an understanding of the reasons that made equal educational opportunity and fiscal equity an issue that the PC government sought to address. The third purpose was to gain knowledge of the reasons and manner in which the concepts of equal educational opportunity and fiscal equity changed over 30 years. In the study I discuss how this information might inform the future directions that the Alberta government, or other provincial governments, may take towards achieving better fiscal equity arrangements for public education.

The Questions

Although the delivery of public education has evolved, the concepts of equal educational opportunity and fiscal equity in public education have undergone changes. Are the changes significant, or have they essentially been unchanged since 1971 when the Lougheed PCs came to power in Alberta? To understand the current funding arrangements, I completed a historical review with primary focus on what the PC government has done to affect equality and equity from 1971 to 2000. That historical review served to enlighten the current situation to foster a better understanding of its successes and failures. Recommendations were made about possible ways to improve on the achievement of equity—both aspects: equal educational opportunity and fiscally equitable funding arrangements—in public education in Alberta. Therefore the questions to be answered were as follows:

1. How has the PC government's understanding of and commitment to equity in education evolved in the last 30 years (1970 to 2000)?
2. What were the reasons for the changes made to achieve equity in education over the time frame described by the study?
3. What were the methods, and did they achieve the desired results?
    (a) What did the funding formula look like in 1970?

   (b) How did the formula change from 1970 to 2000 to meet the policy goals of the PC government?
   (c) Did the policy achieve its goals, and did it improve equity for students? Was it effective?
4. How is the 2000 funding framework
   (a) an improvement on previous frameworks or formulas? and
   (b) meeting the challenge of providing equal educational opportunity for students and fiscal equity for school jurisdictions?
5. What improvements can be made to achieve equal educational opportunity for students and fiscal equity in Alberta public schools?

Definitions

There are two sides to equity in public education, the revenue side of the equation, known by the Department as fiscal equity; and the expenditure side, known as equal educational opportunity. Equity as a term, for the purposes of this study, includes both sides of this equation and means that

1. all taxpayers will contribute to public education in a fair manner that recognizes their ability to pay, and
2. students will have the same opportunity to achieve a defined educational outcome as set out in the Alberta curriculum. This opportunity shall be available regardless of where the student lives, regardless of which school is attended, and regardless of the student's ability or disability. This assumes that educational opportunity will be funded adequately.

The reason that I adopted these terms for use in the study was that they most closely matched the terms used by Alberta's Department of Education.

Equity is a concept that is often confused with the concept of equality. Equity can mean different things to different people. For example, the meaning that an ultraconservative would place on equity could be markedly different from that of a socialist (Callan, 1999, p. 1). Therefore, it is necessary to establish a basis for the definition of other words used around equity. Verstegen (1991) argued that the concept was developed from Aristotle's view of justice, in which justice is no respecter of a person's wealth, influence, or status; it is impartial.

> Equity does not arise when everyone is treated equally regardless of circumstances, but when everyone is treated fairly. Since it is a social phenomenon, the definitions of equity and fairness change over time. Equity is closely linked to adequacy of resources and willingness to provide those resources to achieve a fair distribution of them in the delivery of education. (pp. 2-6)

Effectiveness and efficiency, it may be argued, are both linked to equity. In order to compare the success of achieving equity from school district to school district, it needs to be known whether the same level of resources was used effectively to produce a fixed amount of student opportunity for learning or performance; in other words, were the resources used efficiently? (Levin, 1994, p. 172; Odden & Picus, 1992, p. 161; Sale, 1993, p. 33).

There is a variety of ways of looking at equity. One is to consider *vertical* equity as it is currently addressed by Alberta Learning's[4] supply of additional funds for particular defined student needs that include addressing learning, social, and economic needs. A second is to consider *horizontal* funding equity, which involves offering the same program to all students who have the same abilities and circumstances. This has been addressed in Alberta through a number of different special funds and through the Alberta School Foundation Fund (ASFF). This form of equity is intended to overcome funding shortfalls caused by such factors as distance from a major centre. The current sparsity and distance grants are examples of the government's effort to achieve horizontal equity in Alberta. However, these two only look at equity on the expenditure side—that of delivering equity in resources to students. On the other hand, fiscal equity may be seen through the eyes of the government and the taxpayers who provide funding for public education by asking whether taxpayers from one school jurisdiction are treated fairly compared to taxpayers in other school jurisdictions.

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[4] Alberta Learning was a new department formed in 1999 from both the departments of Alberta Education and Alberta Advanced Education. From here on in the study it will be called *the Department*.

Educational fiscal equality may be achieved in three ways: by providing an equality of inputs, by having an equality of programs for students, and by having an equality of outputs (Richards & Ratsoy, 1987). Briefly described, input equality

> means that every school district should have the same dollar amounts to spend on students at different school levels. . . . Program equalization (equity) provides for the needs of students from different socio-economic backgrounds, . . . [and an] equalization of outputs [is] measured by student achievement. (p. 100)

The equality that Richards and Ratsoy described closely resembles the definition of equity found in the literature that followed in the 1990s.

The primary problem with fiscal equity is in attempting to define all of the factors that cause inequities and address them through economic and social policy. Such a complex problem has economic, social, and political issues intertwined with ideology. Addressing the complexity through public policy adds a dimension that can be sabotaged through lack of understanding, difficulty in communicating the concept clearly, and vested interests that protect or subvert the current formula for equity to fit the situation or desired model.

Specific definitions of terms used in this study are as follows:

- **Adequacy** is the amount of money needed to reach an equitable level of funding to deliver the basic education that the Department expects for each student. Another way of putting it is to ask, How much is enough? For example, the expectation at the time of the study was for all students to attend
    - 450 hours of kindergarten for one year
    - 950 hours of instruction per year for Grades 1 through 9
    - high school for the equivalent of 1,000 hours per year to achieve 100 credits and a high school diploma within a four-year time frame

  How much revenue is needed to meet these requirements in each school jurisdiction given the needs of their students?

- **Capacity** is "the total economic resources available to a government (e.g., a school jurisdiction) for tax purposes" (Goertz, Moskowitz, & Sinkin, 1978, p. 60).
- **Educational need,** for the purposes of this study, determines funding based on the school jurisdiction's profile of student needs as of September 30 of any given year.
- **Equality** is equal treatment of each individual. An example in public education of equality is where the same level of funding is provided for each student. A funding model of this type would ensure the same amount of revenue for each unit of instruction (i.e. student) regardless of circumstances. In the case of the taxpayer, each would pay the same tax; for example, a flat tax on property value.
- **Equalization grant** is a grant that varies in inverse proportion to the measure of ability to pay, which in educational finance traditionally is a measure of real property assessment (Pike, 1971, p. 2).
- **Equity**, according to a commonly held definition of the Department , is attained by providing funding that gives equal educational opportunity to students regardless of where they live or their individual circumstances. In other words, **student equity** occurs when educational revenues are distributed in a way that ensures equality of educational opportunity (Goertz et al., 1978, p. 62).
- **Equity grants** refer to those grants "that are meant to compensate for conditions that result in education-related inequalities that are beyond the control of school jurisdictions" (Schmidt, 1988, p. 7).

  Equity and adequacy are closely linked. For example, students may receive the same amount of resources but if these resources are not adequate, however equal, the students may not be able to meet required expectations.
- **Fiscal neutrality** is a concept based on United States court decisions. In *Serrano vs. Priest*, a California court decision ruled that "fiscal neutrality" is a constitutional principle in the United States" (Goertz et al., 1978, p. 62).

Jefferson (1982) explained, "A system is judged fiscally neutral if there is little or no direct relationship between local district wealth and local district expenditures per [student]" (p. 11).

- **Horizontal equity** is the economic principle of equal treatment of equals (Schmidt, 1988, p. 8). Horizontal equity, a question of delivering justice, can be found on both sides of the equity formula. Equal yield for equal effort is taxpayer equity. On the expenditure side, equal dollars available for students with equivalent needs is student equity. However, according to Verstegen (1991), it is important to set criteria for who exactly is shouldering the cost and who is receiving the benefit (p. 5).
- **Outcome equity** is new concept of equity that the literature is beginning to identify. Such equity addresses each student's success relative to the expected outcomes.
- **Municipal overburden** is "a term often used to describe those school districts which, because of an unusually high level of non-educational service need, are unable to support as high a level of educational spending as their wealth might imply" (Goertz et al., 1978, p. 61).
- **Regressive tax** is "a tax under which a low income taxpayer pays a larger percent of his income in taxes than a high income taxpayer" (Goertz et al., 1978, p. 62).
- **School jurisdictions** are those school jurisdictions that are recognized in Alberta as public and are fully funded by public funds.
- **School Foundation Program Fund** (SFPF) is the fund that the Alberta government adopted in 1961. Meek (1979) described the SFPF as

  > [consisting] of revenues collected through a uniform yearly provincial levy on all real property (residential property exempted in 1973) and an annual legislative appropriation from the general revenues of the province. These revenues are used to provide grants-in-aid to local school jurisdictions for provision of a basic education program. (p. 17)

- **Supplementary requisitions** were used in Alberta by local school districts to obtain revenues for the purpose of providing further funding to meet student needs in addition to grant money received from the government of Alberta. This funding was (and still is in a number of Catholic separate school jurisdictions) obtained by levying a tax on assessed property within the individual jurisdiction.

- **Taxpayer equity** is "the goal of raising educational revenues in an adequate and equitable manner" (Goertz et al., 1978, p. 63).
- **Vertical equity** is "unequal treatment of unequals: vertical equity . . . recognizes that students are different and states the positive requirement that unequals receive appropriately unequal treatment which discriminate, in favor of those with greater educational needs, is necessary and desirable" (Alexander, 1991, p. 291).
- **Wealth** in a school jurisdiction is the assessed valuation of property per pupil. "This focuses on the value of real property of a school jurisdiction, and has the limitation that the ownership of property is not necessarily related to the income of the people" (Jefferson, 1982, p. 12).

The following definitions of equity are related to each other and therefore have been defined separately from the other definitions. Alexander (1991) defined these terms and arrived at an amalgam from the lowest level of equity to the highest from a number of researchers' definitions in the field of equity.

- **Commutative equity** entitles a person to something on the basis of property rights alone. It is equity at a local level, which emphasizes local tax effort and decision making. Swanson and King (1997) contended, "Such a philosophy would not support any public intervention in school finance. Some intervention is inevitable, however. Subscribers to commutative equity would endorse the greatest possible local discretion in using local tax bases" (pp. 319-320).
- **Distributive equity** is an attempt to correct inequitable conditions that may have arisen through government policies related to distributing financial resources. Fiscal neutrality efforts by the parent government would be

included in this definition, as well as supplementary efforts made at the local level (e.g., supplementary requisition) (Swanson & King, 1997, p. 320).

- **Restitution equity** is an attempt to correct inequitable conditions that occur because of social and economic conditions, including those created by government. It does not consider the needs of individual students. Full state funding would be an acceptable means of financing public schools (Swanson & King, 1997, p. 320).
- **Positivism equity** is an attempt to address the educational needs of individual children. Acceptable measures of intervention would include fiscal and other types of intervention in the education system to help disadvantaged students (Swanson & King, 1997, p. 320).

Limitations

The limitations for the study were the following:

1. Because this study considered the change in equity within Alberta over a discrete period of time (1970-2000), the trends and findings are limited to Alberta. However, the findings from this study may have implications for the question of fiscal equity in other Canadian provinces to the extent that similarities exist.
2. Because the study spans three decades, with the passage of time the people interviewed may have had varying abilities to accurately recall the events relevant to the study. This also introduces the question of trustworthiness of the data collected.
3. Individual political perspectives and the wish to protect current and political colleagues might have skewed or limited the information available.
4. Because of the time that had elapsed since some of the events studied occurred, access to documents proved difficult and limited me in gaining a full perspective of the topic. This limitation also affected the interviews, but to offset this limitation and to add to trustworthiness, I provided summaries of the documentary information to aid the interviewees in recalling past events.

5. I brought perspectives and ideologies to the research. These caused an added limitation that is addressed further in epistemology and ontology because personal experience may affect the researcher's view and reporting of the data collected and interpreted.

Delimitations

The delimitations of the study are as follows:

1. The span of time to be studied was delimited to the period of 1970 to 2000 in order to examine the time that the PC government held power as the government of Alberta.
2. The individuals who contributed to the study held office in a variety of positions, elected and appointed, of the government, whether in the Department or the Provincial Treasury.
3. Time was at a premium because many of those individuals who had information were getting on in age and might not have been able to provide accurate information in the future.

Organization of the Dissertation

Chapter One provides an orientation to the study. Chapter Two addresses the literature related to equity in public education, followed by Chapter Three, which describes the research design. Government documents are reviewed in Chapter Four that include Department of Education annual reports, committee and research reports, and the Provincial Treasurer's annual budget addresses. Chapter Five includes ministerial statements, answers to questions in the Alberta Legislature, and the debate found in *Hansard* for the Alberta Legislature. This is followed by three chapters that summarize the interviews with former Ministers of Education (Chapter Six), their Deputy Ministers (Chapter Seven), and other appointed government officials in the Department and the Provincial Treasury (Chapter Eight). The five questions to be answered, as raised in this chapter, are addressed in Chapter Nine. A summary, observations, and implications for practice and further research are addressed in Chapter

Ten. For the sake of consistency, information is generally dealt with by theme and then in chronological order.

CHAPTER TWO:

REVIEW OF THE RELATED LITERATURE

The North American interest in equity for education as discussed in the literature may have influenced the Alberta government's view of this topic over the period examined for this study. To explore this possibility, I reviewed equity to clearly determine what historic and current research has said.

To understand equity, it helps to consider the definition of *equality*. Although not from the same root word as equity, equality is a related concept. Equality is defined as "the state of being equal," which in turn is defined as "having the same rights and having a uniform application or effect" (Allen, 1990, p. 395). In education, equality is an ethical value that "influences decisions about school finance" (Swanson & King, 1997, p. 318). This definition is applicable to both the United States and Canada. Individuals in a society that promotes equality enjoy equal treatment and equal access to social, political, judicial, and economic rights. The concept of equity, however, moves to another level as it is defined in the *Concise Oxford Dictionary* (Allen, 1990): "fairness and the application of the principles of justice to correct or supplement the law" (p. 396). Equity suggests that some members in society, in order to have the same opportunity to be treated fairly and justly, need to have certain additional factors that supplement their daily lives so that they may experience the same rights as all members of society. The supplemental factors may be financial, legislative, or both. Terms that are related to equity are *equal opportunity* and *fiscal neutrality*. There are variety of types of equity, including vertical, horizontal, cumulative, distributive, restitution, and positivism. These terms have been defined earlier in Chapter One. Education of children is one of the rights that Canadians have come to expect be available on an equitable basis.

The literature in this chapter looked at both Canadian and American views of fiscal equity and equal educational opportunity and a historical view of the concepts dating back to the early 1900s when school foundation programs were being discussed in the academic literature. The literature, although not exhaustive, covered the basic approaches to equity in education, which included egalitarian approaches, school foundation theory, vertical equity, horizontal equity, and some discussion on outcome equity. I included American literature on the topic because the Department considered it, whether it was through appointing officials who received their advanced degrees from American universities or looking to the American funding models in designing funding frameworks in the 1950s and 1960s.

Egalitarian Attitudes

The language related to the topic of fiscal equity has changed in the literature since the early 1900s when Cubberley (1906) spoke of egalitarianism in public education for students in the United States:

> Theoretically, all children of the state are equally important and are entitled to have the same advantages; practically this can never be quite true. The duty of the state is to secure for all as high a minimum of good instruction as is possible, but not to reduce all to this minimum; to equalize the advantages to all as nearly as can be done with the resources at hand; to place premium on those local efforts which will enable communities to rise above the legal minimum as far as possible; and to encourage communities to extend their educational energies to a new and desirable undertakings. (p. 17)

Later, Cubberley wrote that education is essential to the welfare of the state and therefore should receive financial support from the state. Further, he stated that a principle had been firmly established that there should be equal opportunity for all students and that education should be equally free and open to all (Cubberley, 1947, pp. 752-753). These are two themes of public financial support and universal access that are found carried forward in the American literature for the duration of the 20th century and into the 21st century. In Canada, the concepts of financial assistance from the provinces and of equal opportunity have also been written about in both academic literature and government documents dealt with public education; this is addressed in Chapter Four. It is clear that these were not new concepts to Alberta prior to the 1970s, the first year considered in this study. The language used in public education discussions included equality and equal opportunity; however, this language changed to fiscal equity and equity for students in the late 1970s.

Levin (1994) pointed out that during the 19th century the common school movement in the United States provided access for every child in a community. He saw this as a demonstration of an egalitarian attitude towards education (pp. 168-169). Canada took a similar direction in schooling. This common schooling did not provide equal opportunity for children in the United States any more than it provided common schooling for all children in Canada. Wealthy communities were able to provide better facilities and teaching conditions than their poor neighbours were able to provide in both countries. Levin wrote that

> Equalization aid was insubstantial, providing only enough support for a poorly funded and minimalist schooling experience. Although every child had access to schooling in some sense, expenditures per child were 5 to 10 times greater in wealthy districts than in poor ones in the United States. Many attempts were made to more nearly equalize school spending among different communities in the ensuing decades, but it was not until the 1960's that existing school finance arrangements faced serious legal and legislative revisions. (p. 169)

Although the roots of the concept of equity may be found within Canada, it appears from the literature on the financing of education that the United States had some influence on the Alberta government because various academic writers from the United States—Cubberley, Updegraff, Strayer, and Haig (1923), and Mort (all as cited in Alberta Department of Education 1969b—were referred to by name and year in the 1969 *Report of the Minister's Committee on School Finance* (Alberta Department of Education, 1969b, p. 9).

Updegraff, an American writer, suggested that state-supported programs for public education be variable, depending on the ability of the local school districts to raise funds from the local tax base. He noted that the purpose of state aid was to guarantee that each child had an equal opportunity to any other child in the state for an education that would best suit the child; however, he wrote that that has not been the case. In Canada similar challenges were experienced.

"Equalization of educational opportunity and the equalization of the tax burden were both ideas within the school foundation program" (Jefferson, 1982, p. 1). To address the need to guarantee an equal opportunity and tax burden, Strayer and Haig

(1923) promoted a guaranteed tax base for the state of New York called a Foundation Program that was determined by local property wealth for the school district. Their plan was designed so that every school district in the state would be financed as though it had a tax base that matched a predetermined level established by the state. The plan was that the difference between the guaranteed tax base and the actual district's tax base, given that the actual tax base was less, would be the amount of financial support that the district would receive from the state. Further, if a higher guaranteed tax base was set by the state, then it would contribute a greater financial amount towards education in districts with an inadequate tax base, thereby narrowing the gap between wealthy districts that could supply adequate financial support and poorer districts that could not. Thus, by using a foundation program with a guaranteed tax base, it was believed that the state could decrease the disparities amongst school districts.

If the state were to "insure equal educational facilities to every child within its border at a uniform effort throughout the state in terms of the burden of taxation, equalization of educational opportunity" (Strayer & Haig, 1923, p. 173) would be demonstrated. In the event that a school district wished to offer more financial support to its schools, it was accepted that they could do so at their own expense over and above what they were able to raise to meet the adequate and minimum standard available throughout the state.

As the 1920s came to a close, the Great Depression of the 1930s set in, and into the mid 1940s there was little written about educational opportunity or any other kind of equalization, according to Jordan and McKeown (1980, pp. 101-102). However, in Alberta a newly elected Socred provincial government, as a result of its election platform, moved to consolidate school districts into larger school divisions, making these new divisions more economically viable. This brought about a pooling of local taxation resources and tended to mitigate in favour of equal educational opportunity (Carney & Peters, 1995, p. 249). Later, the concept of educational opportunity once again found its voice in the 1950s and 1960s. State school finance plans during the 1960s showed an "increased acceptance of school foundation plans, interest in broadening the taxing power at the local levels, and increased development of equitable measures of local ability to support the foundation program" (Norton, 1966, p. 164). Such interest in the foundation program was not only limited to the United States. Alberta implemented an SFPF in 1961. Just prior to this, an Alberta government Royal Commission, which became known as the Cameron Commission, addressed issues related to equal opportunity. In the preamble the resulting report delivered in 1959 stated that there was

> [a belief] that the public schools are such a fundamentally important and essential element of public policy in our society that they must be designed to serve as effectively as possible the one great and basic need of all our people—the opportunity to acquire the best education we can provide for all our citizens. (Province of Alberta, 1959, p. xi)

The report continued:

> It has recommended a measure of decentralization of authority through the evolution of a system of accredited schools and community colleges, and it has emphasized the need to provide greater equality of educational opportunity for all—the gifted, the handicapped and children in rural areas. (Province of Alberta, 1959, p. xii)

The Cameron Commission recommended in its report (Province of Alberta, 1959) that the minimum requirement for teacher qualifications be set at four years of university, including a degree (p. 304). Part of the formula for increased educational opportunity included having teachers with degrees available to teach all students wherever they went to school in the province. The commission also recommended that the provincial government "assume responsibility for administration and finances relating to the education of the handicapped" (p. 311). Even John Cormack, who wrote a dissenting opinion in a minority report, agreed to "children having equal opportunity to develop their abilities to the fullest capacity" (p. 379).

As the 1960s came to a close, equal educational opportunity for students in public schools in Alberta was improved when the SFPF was amended and reformed in 1969. It was again recommended that the minimum qualification of four years of university education be the norm for teachers, which were minimal requirements for teacher certification.

The Minister of Education, on behalf of Alberta's Committee on School Finance (Alberta Department of Education, 1969b), spoke of four sources of school financing and their approaches:

1. Cubberley and Updegraff, whom the committee credited with drawing attention to the equalization principle in school finance.
2. Paul R. Mort, whose finance program was described as one through which a certain sum of money is provided per pupil, and the school board uses the money to organize its resources and address local priorities. A foundation program from the province should provide a "basic, adequate, reasonable, minimum" (p. 9) program. However, Mort saw the need for a separate set of grant regulations, "to encourage boards to modify their expenditure patterns. Thus, with a per-pupil base coupled with a set of grants, local boards and the central educational authority could play creative roles in shaping the evolving educational system" (p. 9) towards equity for students.
3. The committee described the Maryland Plan as one in which financial support was directly related to a centrally determined teacher's salary schedule, recognizing and making allowances for the teacher's experience, training, and designation. This plan also factored in an arbitrary pupil-teacher ratio as an arbitrary constant along with other operating costs.
4. The Updegraff Plan was described as a variable-percentage plan that focused on the fiscal-equalization side of educational finance, and the province and the local school jurisdiction shared costs for certain specified categories of expenditures. The committee understood that a levy of a mill would raise the same amount of money in rich and poor jurisdictions; however, the weakness was seen as taxpayers in poorer jurisdictions, who would have a higher marginal utility to raise the extra dollars of taxes, being disadvantaged compared to wealthy taxpayers (pp. 8-14).

Liberty, Democracy, and Equal Opportunity

In the United States one debate centred around equal educational opportunity for students and its interaction with what was seen as an opposing concept: liberty (Wise, 1968, p. 7). Wise wrote that "whenever an area of activity is brought within the control or regulation of government to that extent equality supplants liberty as the dominant ideal and constitutional demand" (pp. 7-8). However, he also argued that the goal of American education was to "enable every youngster to fulfill his potentialities, regardless of his race, creed, social standing or economic position" (p. 148). The desire for all children to have an equal educational opportunity, however, contrasted with the desire of wealthier families for the best education that they could afford for their own children—families who wanted the liberty to choose (Coons, Clune, & Sugarman, 1970, p. vii).

The concept of equal educational opportunity surpassed the idea that everyone should be treated equally. It promoted the access of all children to the public school system, where they could obtain an education that suited their need to reach their potential, but it resulted in situations in which unequals were treated unequally to provide equal opportunity. This became a norm that was pursued in both the USA and Canada.

Fiscal Equity and Equal Educational Opportunity

Some writers saw fiscal equity, on one hand, as a concept that addressed the revenue side of the equation: It considered whether taxpayers were treated fairly. Others suggested that fiscal equity had to deal with both the revenue and the expenditure side of the equation in paying for public education; it was concerned with meeting certain students' varied educational needs by providing the appropriate level and type of resources. Outcome equity, a related concept that appeared in the 1990s, was discussed with regard to the resources needed for students to succeed in their postschool careers.

The concepts of fiscal equity and equal opportunity have been and still are considered important because they address a person's right to education and promote democracy. Rawls (1971, p. 302), in speaking of a student's rights in the United States, suggested that social and economic equalities be arranged so that the greatest benefit accrues for the least advantaged and that students have access to education conditions under which they can be offered an opportunity equal to that of others in society. Equity, for some researchers, included the preschool programs and preparation that allow less-advantaged students to start school with "the appropriate conditions for learning" (Bastian, Fruchter, Gittell, Greer, & Haskins, 1986, p. 30). Equity, for others, took different forms depending on the grade level and the type of education being received. These included compensatory education, equal rates of participation, equal expenditures per pupil, offset exposed learning differences, and equivalent learning resources for students (Ettich, Lacombe, Von Zur Muehlen, 1972, p. 30).

Ettich et al. (1972) saw a need to promote equity in state education systems because expenditures for education differed between school districts:

> In general, equality of opportunity is concerned with who is getting education and the type of education being received. Fiscal equity carries this one step further by attempting to relate the beneficiaries to those who bear the tax burden. The purpose is to determine if the net effect of educational expenditures is regressive, progressive, or neutral. . . . Equality of opportunity may refer to equal expenditures per pupil, it may refer to compensatory education. It may refer to equal rates of participation for students of all social classes. (p. 30)

There has been a need to apply equity principles to both the revenue, or taxpayer, side and the distribution of the resources used for learning (Berke, Campbell, & Goettel, 1972, p. 3). With respect to students, Goertz et al., 1978) explained that "one must chose between two concepts of equity, that of equal treatment of all students [horizontal equity], or different treatment of different students [vertical equity]" (p. 8). Further, the other side of the formula, revenue for education, must be part of any consideration of fiscal equity. This can be interpreted as the fiscal capacity of a school district.

> Capacity equalization is the process of compensating for differences in school districts' ability to support education in order to achieve student equity and taxpayer equity. Service and programmatic equalization is the process of compensating for differences in the level of services or programs in a school of school district in order to achieve student equity. (p. 52)

Outcome Equity

Another approach to equity is to consider outcomes that are measured by taking into account the life achievements of each student. "If equality of result is the goal, equal opportunity requires a continuum of means as well as chances, which are extended, not exhausted by obstacles of learning (Bastian et al., 1986, p. 30). The discussion of outcome equity has continued through the 1990s (Berne & Picus, 1994, p. 11). Earning potential, income, and satisfaction as adults serve as measures to determine whether students have been treated equitably during their public schooling. "Resource equity is a necessary but not sufficient condition to reduce outcome inequities" (p. 253). Concerning equal outcomes, Wilson (1975) advised that

> if the fullest development of intellectual potential is one of our educational goals, then marked differences in innate intelligence must be a basic limitation on the equality of the outcome—a conclusion which ideological egalitarians would be loathe to accept. (p. 12)

Role of the State

Researchers saw the state as playing an important role in achieving equity. Statewide leadership and policies were considered to be necessary for effective public education. These policies included (a) establishing a professionalized teaching force; (b) ensuring an equitable distribution of resources; (c) developing and implementing a statewide accountability system that would include appropriate school, district, and state-level allocations and responsibilities; (d) providing effective technical assistance to school districts; and (e) developing mechanisms to correct extreme failure (Berne & Picus, 1994, p. 254). How to measure success in achieving equity in student outcomes has remained a difficult task to this day. Litigation trends in parts of the United States during the 1980s indicated that the state has the affirmative duty to ensure student achievement (Berne & Stiefel, 1984, p. 11). This has not been the experience in Canada, but the provinces have assumed it despite the absence of court cases.

In Alberta during the late 1970s education funding appeared to be established "on the premise that every local school jurisdiction, regardless of its wealth, should [have been] able to offer an adequate minimum level of education for its students" (Jefferson, 1982, p. 6). If there was a difference between the funds that the provincial government provided and those required by a local jurisdiction, the local jurisdiction was responsible for raising the funds to achieve the minimum level of education that was expected by the province. Any public funds that were assigned to education were gained in competition with priorities from other government departments and their requests for funds (p. 15). As a province in Canada, "it is generally agreed that [Alberta's] system for financing elementary and secondary education should be accountable and understandable, autonomous and flexible, predictable, stable, fair and equitable" (Kitchen & Auld, 1995, p. 24).

A number of researchers and writers have defined measurements for fiscal equity and equal educational opportunity. Berne and Stiefel (1984) and Alexander (1982) provided the following questions and definitions to develop a means of measurement.

Berne and Stiefel's Questions for Evaluating Equity

Berne and Stiefel (1984) proposed four questions for evaluating equity in school finance systems:

> 1. Who? What is the makeup of the groups for which school finance systems should be equitable?
> 2. What? What services, resources, or, more generally, objects should be distributed fairly among members of the groups?
> 3. How? What principles should be used to determine whether a particular distribution is equitable?
> 4. How much? What quantitative measures should be used to assess the degree of equity? (pp. 4-5).

Alexander's Hierarchy of Philosophical Equity

Alexander's (1982) hierarchy of philosophical equity included four categories, as defined earlier in Chapter One. These categories were a composite of definitions developed by writers who addressed equity in education: commutative equity, distributive equity, restitution, and positivism. Figure 1 summarizes Alexander's four levels of philosophical equity. Note at the bottom of the figure a continuum that relates each level to its degree of conservatism versus liberalism.

Berne and Stiefel's (1984) and Alexander's (1982) philosophical approaches to equity apply to Canada as well. However, Canadians look at equity differently from Americans. Schmidt (1988) observed that

			Positivisn Fiscal neutrality Uniformity of effort Cost of delivering education Economics of scale Government overburden Corrective programs Remedial programs
		Restitution Fiscal neutrality Uniformity of effort Cost of delivering education Economics of scale Government overburden	
	Equal Distribution Fiscal neutrality Subsidiarity (local choice) Unlimited local effort		
Commutative Local leeway Subsidiarity (local choice) Unlimited local effort			

Conservative -- Liberal

(Adapted from Swanson & King's (1997) interpretation of Alexander's 1982 model)

Figure 1. Philosophical equity.

> when Canadians speak of equality, they tend to mean equality of ultimate condition, which is the meaning of the term under socialism. When Americans speak of equality, they tend to mean equality of opportunity, or a fair start in the race of life, which is the meaning under classical liberalism. (p. 35)

Sale's Criteria for Assessing Education Finance Systems

Sale (1993) listed four criteria for assessing education finance systems:

Adequacy - does the system provide sufficient resources for an agreed on a standard of services?
Equity - does the system distribute the available resources fairly across school systems, and within divisions? Are the funds to pay for the system raised in a manner which is fair to taxpayers?
Efficiency - does the system use the resources it has in a manner which is generally thought to be efficient, with unknown methodologies of instruction? Is this system structured in ways to allow for effective use of scale, distribution of pupils, resources, etc.?

> Liberty - does this result in individuals gaining a high level of freedom to make decisions regarding their personal and economic future? (p. 33)

Sale's equity discussion included the related concept of efficiency and the competing concept of liberty, which suggests that considerations of equity must include these concepts.

Levin's Two Conditions for Efficiency

Levin (1994) argued that there are two types of efficiency: technical and allocative. Technical efficiency achieves the best output for a given set of resources, whereas allocative efficiency applies the most appropriate resources to a situation given their price and productivity. He suggested that too often in our schools, students are not provided with the appropriate allocation of resources and therefore are not treated equitably. Levin proposed that an economic analysis be done to measure efficiency:

> 1. A clear objective function with measurable outcomes,
> 2. Incentives that are linked to success on the objective function,
> 3. Efficient access to useful information for decisions,
> 4. Adaptability to meet changing conditions, and
> 5. Use of the most productive technology consistent with cost constraints. (pp. 172-173)

Without efficiency, "schooling cannot be truly equitable" (King, Swanson, & Sweetland, 2003, p. 269). Today, developing policies that encourage efficiency is the challenge that educational finance systems face in improving equity (p. 517).

Equitable Funding Models

Equitable funding models that provide resources for students to meet a universal curriculum are very different from models where the funds are allocated for an individual student's case based on that student's needs. Models that look at individual student needs, it has been argued, should not use universal test scores in determining their programs and whether or not programs for that particular student were efficient and effective. On the other hand, universal scores consider the limited dimensions of the curriculum and do not take into account the full breadth of the student's needs. A more holistic view of the student's program is needed, according to Levin (1994, pp. 175-176).

> Appropriate funding and provision of other resources and programs can only create the necessary condition for achieving educational equity. The sufficient conditions require that all schools focus on the needs of their students such that they efficiently transform those resources into valued educational outcomes. (pp. 187-188)

Autonomy, Taxation, Revenue, and Fiscal Equity

The ability of the local school jurisdiction to raise money from local property taxes has been a long-standing element in educational funding. Such practice has been common since the inception of public schools in Alberta just as it has been in other provinces across Canada. There has been a concern that centralizing this ability to raise funds would diminish the local autonomy of school boards almost universally across Canada. Such loss of autonomy has been experienced, many local school trustees would argue, in all of the Canadian provinces except Saskatchewan. Alberta moved to centralized revenue collection and distribution of funding for education in 1994 when the government took away local school boards' ability to tax. However, the long-standing practice of joint revenue generation (provincial and local taxation ability) "results in inter-district educational inequalities" (Alexander, 1989, p. 1), Murphy (1993) reported that this occurred in Alberta prior to 1995. Despite students having guaranteed access to educational programs as a result of the 1988 School Act, " the reality was that school jurisdictions did not have equal access to revenues for the provision of equitable educational opportunities" (p. 24). This was the situation until the Alberta government took over responsibility from local school boards in 1994-1995. After this date the government collected property tax for education from ratepayers based on an equalized assessment. The government then used this revenue, along with revenue from the provincial treasury, as it had done in the past, and distributed the funding to school boards on a per-student basis. A more complete discussion is included later.

Tax Policy and Equity: A Model

In addition to students being treated equitably, taxpayers need the same treatment in order for equity to exist on both sides of the revenue and expenditure equation. Generally in our society, Swanson and King (1997) believed, "all individuals should contribute to the public good and be treated in uniform ways" (p. 94). However, they stated that it is also recognized that taxpayers are not equal: Some have a greater capacity than others to contribute to the public good. They offered three principles for discussion:

> 1. the benefits-received principle where people contribute an equal amount to what they receive,
> 2. ability to pay principle where taxpayers contribute an amount proportional to what they are able to pay, and
> 3. horizontal and vertical equity principles where equals should pay the same amount and unequals should pay an unequal amount based on their circumstance that would be reflected in their ability to pay. (pp. 94-95)

Equity and Choice: A Mapping Model

In a presentation at a School Choice Conference in Calgary, Henry Levin (2002) proposed a method for evaluating public policy that uses a simple template with four major criteria for analyzing school choice plans. He used an advantage map to compare and analyze any government policy using four criteria. The map includes the following four clusters and their advantages:

1. Social cohesion, developing a sense of community
2. Equity, treating individuals fairly dependent on their circumstances
3. Productive efficiency
4. Freedom of the individual to choose

Levin stated that often the debate centres around efficiency and equity as "market force" issues. Further, he noted a direct conflict between the freedom to choose and social cohesion. Policy typically tends towards positioning itself, upon evaluation, at the bottom or at the top of the map. For example, it would be extremely difficult for a policy to promote the ability for someone to choose while still promoting social cohesion. Table 1 provides a simple evaluative tool for policy to determine whether it favours choice, efficiency, equity, or social cohesion. This table was refined further to assist in the analysis (Appendix B).

Table 1

Policy Mapping Based on Four Criteria

Criteria	Policy to be evaluated
Social cohesion	
Equity	
Productive efficiency	
Freedom to chose	

(Adapted from Levin, 2002)

Current Events

Campaign for Fiscal Equity in New York State. In June 1999 the Campaign for Fiscal Equity (CFE; 2003), an organization in New York State, launched a challenge against the state under the New York Constitution regarding the state's funding of New York City public schools alleging "[alleging that the State unconstitutionally under-funded the City's schools (¶ 1). On June 26, 2003, the Court of Appeals, New York 's highest court delivered a decision in favour of CFE. A summary of the decision was prepared by CFE: "The state [New York State] funding system must be reformed to ensure that every school in New York City has sufficient resources to provide its students with the opportunity for a meaningful high school education" (¶ 1). This judicial decision directly linked the concept of fiscal equity for students with adequacy of funding. With a similar judgment in Kentucky (Schugurensky, 2003), it may be prudent for other jurisdictions in the United States and Canada to take measures to protect themselves against such a challenge.

Equal opportunity and teacher qualifications. Powers (2004), in considering the issues found in Williams v. State of California, stated:

> Increasing and equalizing the percentage of fully credentialed teachers is an "input" that is not only relatively amenable to change through state and local policy—and certainly much easier than building additional facilities to ease overcrowding—but also contributes to school performance. (Note 26) Addressing the disparities documented here might entail creating pay and other incentives (e.g., increased autonomy) that would encourage experienced teachers to work in high-poverty schools. (p. 23)

Powers concluded that the middle class would wish to have credentialed teachers for their children in their schools; therefore, why, if equal opportunity is a goal for public education, should we accept anything less for poor or high-poverty neighbourhoods? Her statement was interesting in light of the US federal government's program No Child Left Behind, which requires that "highly qualified teachers stand at the front of every classroom" (Schemo, 2004, p. 20). However, the Secretary of Education, Rod Paige, announced on March 15, 2004, that the Department had "eased the way for schools to meet the law's requirement that highly qualified teachers stand at the front of every classroom" by allowing teachers certified in one subject in rural districts "three years to demonstrate their competence in other subjects they are assigned to teach" (p. 20). Dr. Paige (as cited in Schemo, 2004), stated, "The policies announced today offer common-sense solutions that will help states and districts get the best teachers in front of the most needy students as soon as possible" (p. 20).

As noted earlier in reference to the Cameron Commission's recommendations (Province of Alberta, 1959) that promoted the notion that teachers across Alberta have at least four years of university training and a certificate to teach, Powers (2004) research and the related news story in the USA (Schemo, 2004) demonstrate that there is still a widely held belief that the quality and credentials that teachers bring to the classroom make a difference in student learning. Combined with the concept of equity for students, this belief supports the idea that all students, regardless of where they go to school, should have the opportunity to be taught by teachers who are both qualified and trained to teach them.

In conclusion, the literature showed a consistency with what happened in Alberta. In addition, the thinking on the topic of equity proved valuable in establishing an approach to the data gathered. No one model was used in its entirety, but they all influenced how I developed an analytical model to make sense of the data collected. According to the literature:

1. Canadian and American thinking is different on liberty's relationship to student equity.
2. The approach to equity, although it maintained fairness as a fundamental concept, evolved from Cubberley to Alexander, from egalitarian thinking to positivism.
3. Fiscal equity is seen to have evolved as well from the point at which local property taxpayers were looked to for support of schools to where the state, or province, is considered the best source of funds to make collection and distribution most equitable.
4. Equity and social cohesion, in Levin's evaluation, contrast with and work in opposition to efficiency and choice.
5. Court decisions in the USA have shaped and continue to shape how equity is defined and delivered to students.
6. Autonomy for local school boards, although a laudable goal, appears to work against state delivery of equity for all school districts. In other words, the state plays a major role in determining equity in an educational system.

Although the literature described equity, it is apparent that equity remains a difficult concept to achieve, whether for the taxpayer or the student, because society changes its expectations through the political and legal process.

CHAPTER THREE:

DESIGN OF THE STUDY

This case study relied on historical evidence, both written and spoken. The topic is equity in Alberta's public education from 1970 to 2000. The initial history considered the historical period during which Canada became a nation and the fundamental responsibilities for both the federal and provincial jurisdictions were laid out. Responsibility for education was given to the provincial governments. The concept of equity, both the revenue and the student side of equity, was traced from the inception of the British North America Act in 1867 until 2000, with particular emphasis on the record from 1970 to 2000. In addition, I interviewed key educational and government leaders whose knowledge, experience, and tenure were part of or spanned the period of 1970 to 2000. These interviews were key to understanding the reasons for the development and modification of policies and regulations that emerged over the 30 years that I studied. Such an understanding provided an historical backdrop to the evolution of equity for students in public education and how revenue was gathered from taxpayers and other revenue sources. The information gathered might help to inform future actions that any Alberta provincial government could take with respect to fiscal equity and the resulting degree of equity for public school students.

It was imperative to understand why, as Manzer (1994) said, "political ideas interact with political interests; both are influenced by political experience" (p. 5). Hence, it was essential not only that the public documents be considered by the research, but also that key people who shaped the political evolution of equity for public education be interviewed and allowed to speak about their experience and involvement in how these policies came to be.

Ben Levin (2001) took a similar view to Manzer's (1994) in that the elements that shape government policy are complex and governments are there primarily to define and implement program. "Of course, policy is important to government, but the evidence would certainly seem to indicate that it is only one factor, and often not the pre-eminent one" (Levin, 2001, p. 23). He continued:

> Political agendas as being created from the intersection of three processes—political events, problem recognition, and policy proposals. Each of these streams . . . can serve either as an impetus to action or as a constraint to it. An issue takes an important place in the political agenda only when the three streams come together such that there is a political recognition of something as a problem, a political opportunity to take action, and an acceptable proposal as to what action will be taken. (p. 65)

Data Collection

The data that I sought in this research was qualitative rather than quantitative in nature. I wished to learn what the decision makers were thinking and why they made the decisions affecting equity that they did. I did not look to financial records, budgets, and financial reports at the provincial or the school jurisdiction level, other than to gain a background understanding of the financial emphasis and trends as they were reflected in the thinking and direction of the politicians. I wanted to gain a picture of what factors that affect equity were emphasized. Hence, I searched out those statements, in both government reports and the Legislative Assembly's record and within the interviews that might reflect the thinking and emphasis on fiscal and student equity. I looked for themes related to education finance, special student programs, revenue sources such as property tax, and equity grants, to name a few, in these documents on a systematic and similar basis.

The research included 18 interviews. I chose to interview the past cabinet ministers of education and the deputy ministers for the period 1970 to 2000 to gain their perspectives on equity in public education and to gain a consistent and chronological trail of information and thinking on the research topic. From here, based on recommendations from the ministers and deputy ministers as well as my supervisor, Dr. Peters, I selected five other government officials. The research needed information from the individuals who worked directly in the area of funding education, and I therefore looked to people who were available. I also wanted the perspective of someone from outside the Department of Education, and it was suggested that I approach Mr. Al O'Brien, former Deputy Treasurer, who worked in this department throughout the period studied. I did not seek other interview candidates because the number of interviews had reached a level that was still manageable. Furthermore, the participants began to repeat the information, which suggested that most of the relevant information had been gathered.

My assumptions in selecting the data sources that I did were simple: (a) I believed that the best sources of information were the players who made the decisions and developed the policy; (b) these people were available and, as it turned out, willing to share information about equity; and (c) I believed that they would tell me the truth to the best of their ability and memory.

I collected data through document searches and reviews to establish the goals, objectives, and nature of equity in Alberta public education spanning the 30 years studied. Guided by a prepared set of questions, I interviewed individuals who were directly involved in the decisions that affected funding public education over the 30 years.

Figure 2 presents a model for viewing equity in Alberta public education from 1970 to 2000 that assisted the research by providing a plan for gathering data. Figure 3, a model for interpreting information, assisted in synthesizing the data that I collected, along with Table 2, which displays an example of the evaluation of equity in Alberta public education for each Minster of Education from 1970 to 2000. Table 2 was used in analyzing all the data collected: government documents, Hansard, and each interview for the duration of each Minister's appointment.

Ethics Review

Because interviews formed a major component of the data collection in the research, an ethics review was required. I submitted the review to the Faculties of Education and Extension Research Ethics Board, and it was accepted on January 5, 2003. Each individual whom I interviewed signed a permission form that allowed me to interview him or her and to use the information gained from the interview for the purpose of this research (see sample in Appendix C). All of the participants understood from my letter to them, my conversations with them at the interview, and the consent form that their names would not be kept confidential. They also understood that the reason for this was that, because of their public profile, any comment that they made could easily be attributed to them, even without their names. As a result, I have identified them in the interview summaries.

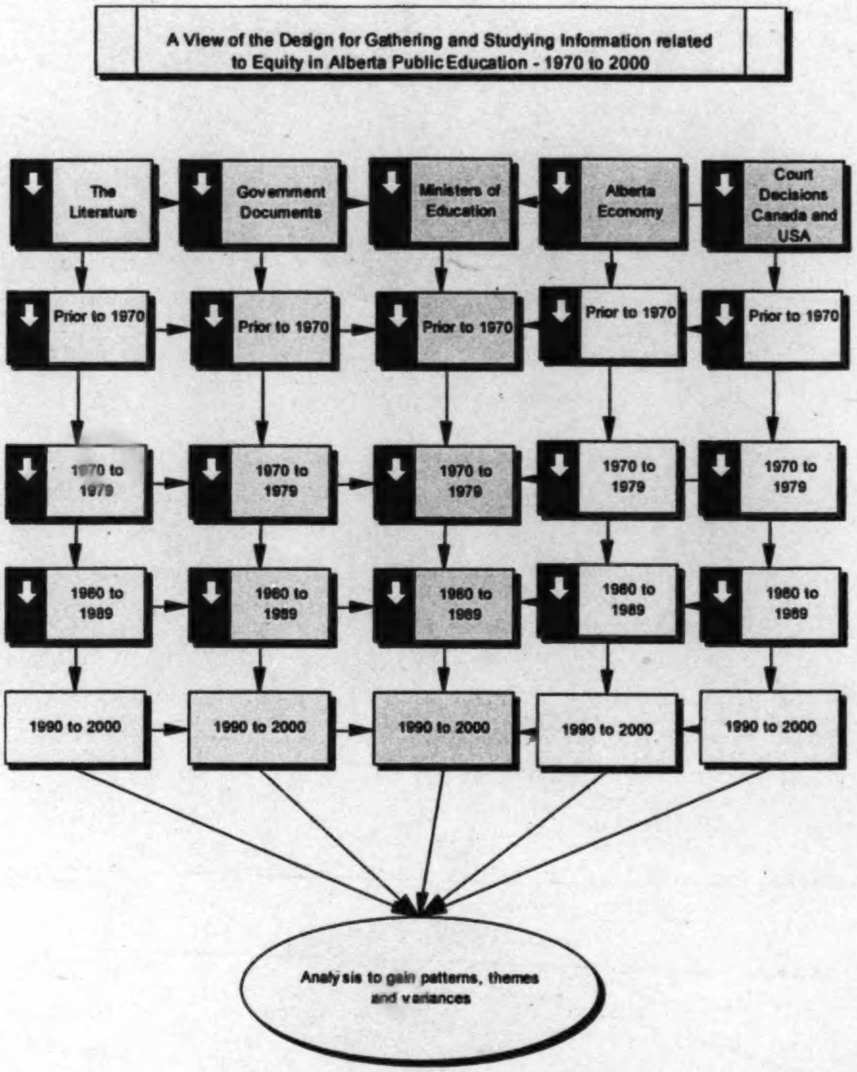
A View of the Design for Gathering and Studying Information related to Equity in Alberta Public Education - 1970 to 2000
The Literature
Government Documents
Ministers of Education
Alberta Economy
Court Decisions Canada and USA
Prior to 1970
Prior to 1970
Prior to 1970
Prior to 1970
Prior to 1970
1970 to 1979
1970 to 1979
1970 to 1979
1970 to 1979
1970 to 1979
1980 to 1989
1980 to 1989
1980 to 1989
1980 to 1989
1980 to 1989
1990 to 2000
1990 to 2000
1990 to 2000
1990 to 2000
1990 to 2000
Analysis to gain patterns, themes and variances

Figure 2. Model for gathering and studying information on equity in Alberta public education (1970 to 2000).

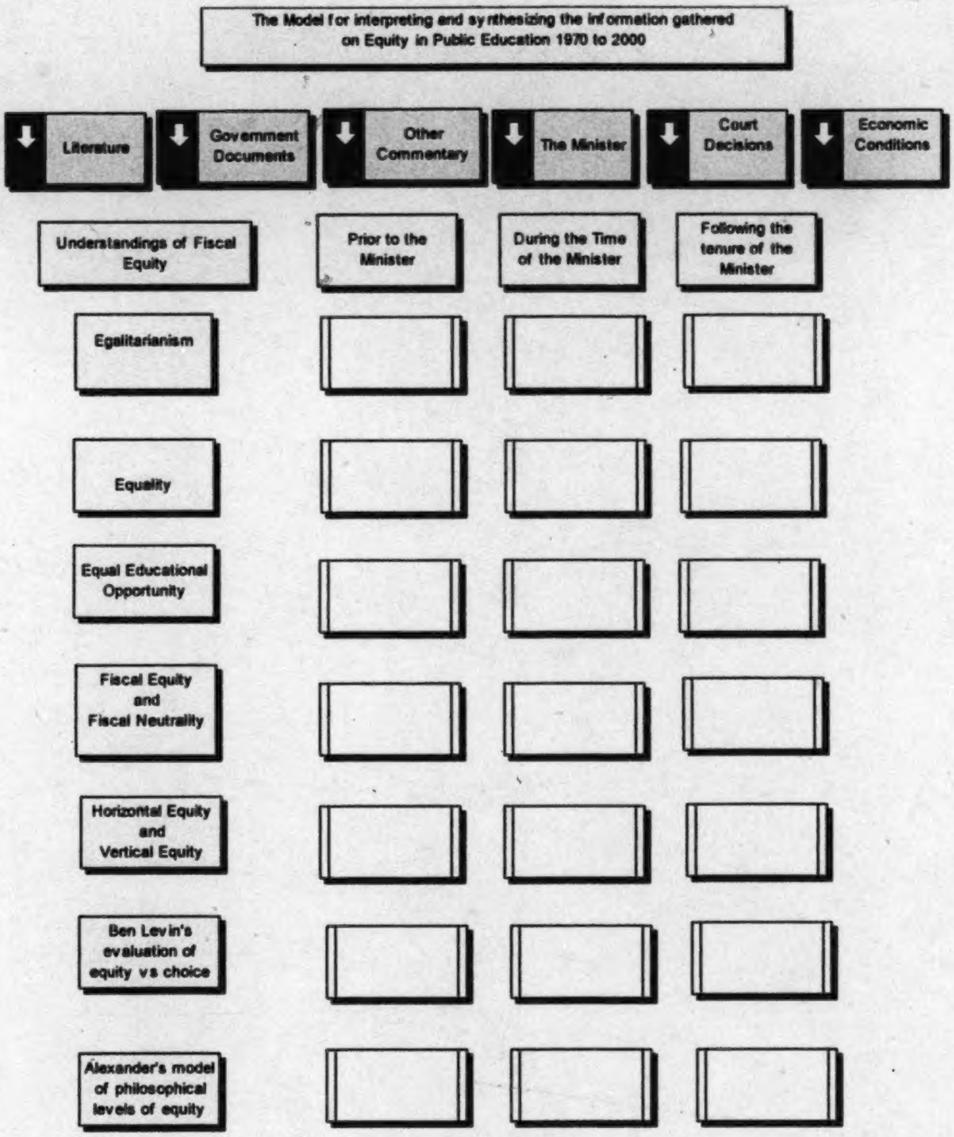
The Model for interpreting and synthesizing the information gathered on Equity in Public Education 1970 to 2000
Literature
Government Documents
Other Commentary
The Minister
Court Decisions
Economic Conditions
Understandings of Fiscal Equity
Prior to the Minister
During the Time of the Minister
Following the tenure of the Minister
Egalitarianism
Equality
Equal Educational Opportunity
Fiscal Equity and Fiscal Neutrality
Horizontal Equity and Vertical Equity
Ben Levin's evaluation of equity vs choice
Alexander's model of philosophical levels of equity

Figure 3. Model for interpreting information.

Table 2

Sample: Model for Evaluation of the Data by the Minister

Categories			Comment
Equal opportunity	Beliefs		
	Definitions		
	Influences	Parents Teachers Community Research Reports Department Caucus Opposition Legislature Provincial revenue	
	Tools	Policy	
		Special funds	
		Technology	
Fiscal equity	Beliefs		
	Definitions		
	Influences	Parents Teachers Community Research Reports Department Caucus Opposition Legislature Provincial revenue	
	Tools	Policy	
		Special funds	
		Other	

Data Analysis

In considering the questions posed in this study, I brought to the research the perspective of a school administrator and active Alberta Teachers' Association (ATA) member. In addition, I brought my life experiences, which include an upbringing in a small rural village in northeastern Alberta, a Bachelor of Science degree, a Professional

Diploma after degree in Education, and a Master's degree in Education, all from the University of Alberta. For a period of three years, from 1973 to 1975, I worked as an executive assistant to Mr. Ray Speaker, a Socred MLA, and have maintained a friendship with him over the last 30 years. My role in salary negotiations and my training as an economic consultant for the ATA provided particular knowledge and perspectives that formed my particular bias, and my perspectives from my training and experience with education finance served as an advantage; however, at the same time they created limitations in the views or perspectives that focused my attention on the question. I feel that revealing my background is important because "in doing research there is always a reflexive understanding potentially present: in our action is our knowing" (Lather, 1991, p. xv). Usher (1996) added:

> Reflexivity is "finding out" about how meanings, including the meanings given to and generated by research, are discursively constructed within the practice of research, and therefore how all understanding, including the understanding which precedes and accompanies research, is bound up with language and its work of constructing a world to be researched. (p. 39)

Unless the reader understands my bias and perspectives, it is difficult for him or her to interpret and evaluate what perspective is taken in the research. The language that I used in reporting my research and the conclusions that I drew helped to shape and limit the findings. My personal values from my life experience, training, and upbringing all entered into the research. Guba and Lincoln (1998) explained that "values have pride of place; they are seen as ineluctable in shaping . . . inquiry outcomes" (p. 214).

In this study I examined documents and formulas that were data driven. They included Alberta government documents including those from Alberta Education, relevant court decisions, and economic profiles for Alberta over the period of 1970 to 2000. I also sought documents from other Canadian provinces, along with American sources if I believed that they influenced the Department in its pursuit of educational fiscal equity. One might argue that such documents would be enough. Sadly, documents lack the perspective of the actors, initiators, and circumstances surrounding the setting of government policy and formula. Such a setting is more subjective and is in need of closer scrutiny.

In the data analysis I considered categories and patterns that emerged from the review of public documents and the interviews as the research dictated and progressed. The language in the documents had political overtones as well as a vocabulary that was unique to the world of legislation, funding, and education. The interviews showed this as well. Therefore, both the public document reviews and the interviews were included in what Denzin and Lincoln (1998) referred to as an "unspoken element of tacit understanding" (p. 299). In the research I also considered implied information.

Language and communication in any field have their own unique meanings related specifically to the subculture of that particular group or specialty. Altheide and Johnson (1998) spoke of an analytic realism that is

> founded on the view that the social world is an interpreted world. It is interpreted by the subjects we study. It is interpreted by the researcher. It is based on the value of trying to represent faithfully and accurately to the social worlds or phenomena studied. (p. 292)

Although their context is ethnographic research, I believe that it is germane to the research that I undertook here. I realized that the verbal communication provided in the interview not only limited the data, but also produced tension through incomplete and unspoken messages and contributed to unclear rather than explicit information. This element of incomplete and unwritten messages was also evident in the public documents and related literature that I reviewed.

Interpreting the Data

I sought out common themes by reviewing the data collected from both the documents and the interviews. First, I organized and prepared the data from the documents in a format that allowed comparison and assisted those being interviewed with recalling the policy with which they were involved in their leadership roles in public education. Second, the organization of data assisted in interpreting the data to extract common themes. I then considered similarities and differences between the documentary data and the data gathered in the interviews. Because the interviews were retrospective, it was possible for those interviewed to reflect upon why any particular policy action proved successful or failed. They had the opportunity to look back particularly at plans and policy set out to achieve fiscal equity. Table 2 assisted me in organizing the interview data into a format that helped me to better understand the relationships between the data in Hansard and that in the Department's documents.

When it came to placing the words in text as I wrote the research in "public" form, I considered Denzin's (1998) comments that one has to consider epistemology (how the text legitimizes itself) and a variety of decisions concerning what will be written down and how it will be represented (pp. 319-323). With respect to epistemology, he suggested that "we be satisfied with local, pragmatic rationales for our conceptual interpretive approaches" (p. 320). Some of the decisions that Denzin saw in the writing of the text are as follows:

> 1. what will be written about,
> 2. what will be included, and
> 3. how will it be represented [he suggested that the research is self-represented, that it is a version of the researcher's self]. (p. 319)

Later in the chapter he continued, "The challenge in writing is how one moves from a blank page (or screen) to a written text, one sentence after another, building an emergent, reflexive interpretation of the subject matter at hand" (p. 321).

Trustworthiness

In an exercise to determine how trustworthy the data were, I sent each of the individuals to be interviewed a letter (Appendix D) to introduce myself and my study. Attached to the letter was a set of questions (Appendixes E and F) that I planned to follow in the interview, along with a brief set of definitions of *equity* (Appendix G). When I met with those selected for an individual interview, I introduced them to the purposes of the study and the questions and told them that I would ask them to review and edit the resultant summary from the interview. Does this produce an accurate document? Yes, it does, because it allows people to rethink what they said and correct errors in memory. One needs to assume that the participants are providing an accurate account of what they have been asked. Because the information could, on some occasions, be verified by documents, its accuracy could be verified. However, much of what was recalled had not been recorded in any document, and the second method determined whether what was said matched what others had said. This helped, but often the only recollection that I could find was that of the interviewees, and nothing else could verify the correctness of the recollection; therefore the only way to verify it was to determine whether or not it was internally and externally consistent with all of the data. By making the effort to determine the accuracy of the interviews through involving those interviewed and having the documents available, I could verify the accuracy of the data gathered and thus increase the trustworthiness of the findings. This view of trustworthiness is consistent with that of Altheide and Johnson (1998), who asked:

> How should interpretive methodologies be judged by readers who share how knowledge is acquired, organized, and interpreted is relevant to what the claims are? . . . As long as we strive to base our claims and interpretations of social life and data of any kind, we must have a logic for assessing and communicating the interactive process through which the investigator acquired the research experience and information. (p. 284)

Organization of the Data

The organization of the data does in fact present a bias particular to me because I organized it and I decided what to include and what not to include from an exhaustive search of documents and over 550 pages of transcripts from 18 interviews. I have attempted to organize the reported data in a transparent fashion, recognizing that my biases still affect what and how I report my findings.

Because the data must be interpreted from a political, cultural, and economic perspective, it was important to gather information from a variety of perspectives. I anticipated that some of the interviewees would protect their positions and that their comments would be subjective in nature. I identified and described the political perspectives that the individuals brought to the interviews as well as the perspectives of the governments that made the specific policy changes. It is noteworthy that Mar, Jonson, Palmer, and Bemount all held positions in the government at the time of the interviews, and I knew that the information that they offered in their interviews might be limited by the need for each of these individuals to be sensitive to government understandings relating to confidentiality.

I compiled the data from different sources and then compared and evaluated them for common verifiable information that would help to validate the findings. The interviewees assisted in verifying the data that I had collected from other sources. I then verified the data from the interviews by sharing the text of the summary of each interview with the interviewee. This gave them an opportunity to edit and provide feedback on my interpretation of the interview. I assured each of them that they could make any changes that they wished to their interview summary. Their responses were varied, all the way from giving me permission to use the text as I had provided it to an individual's making a number of corrections and changed direct quotations to better reflect what he or she wished he or she had said.

I searched for common themes in the data, which in turn I used to answer the five questions listed in Chapter One. I then developed Table 2 found on page 32, used it to sort the data into categories, and synthesized it into summaries to answer the questions. In addition, to gain further understanding of the data, I followed Alexander's (1982) model (Figure 1, and further refined in Appendix H), which assisted in determining the level of equity achieved by the Alberta government.

The data collection for a 30-year term was extensive, as can be seen in Chapters 4 through 8. However, the themes around equity were much briefer, as is evident in Table 2. Within each descriptor in this table, I learned that the themes that affect equity in Alberta's public education system are policy, legislation, court decisions, equal educational opportunity, and fiscal equity. Second, within these themes the issues were Roman Catholic separate schools, special-needs students, funding equity between grade levels, teacher certification, sparsity and distance, minority language, corporate pooling, school foundation funding, supplementary funding, and differentiated funding.

It is interesting to note that only one person of the 18 interviewed was a woman. This was not by design; neither was it something that could be corrected by approaching another group of individuals who were women who held the positions that dealt with equity in educations. There was no one, other than the one woman, who could have been interviewed within the interview description chosen.

CHAPTER FOUR:

REVIEW OF GOVERNMENT DOCUMENTS

The documents that I selected and reviewed in this chapter were chosen with the assumption that they would provide insight into what the Department of Education's officials were emphasizing and what they were thinking with regard to fiscal equity and equal educational opportunity for students. Further, these documents allowed me to gather data that I could use in the interviews and helped them to recall incidents from the time that they served in government. The data gathered and discussed in this chapter also allowed me to compare and verify the information that I collected from other sources.

The literature from government of Alberta sources used in this research spans a period from 1867 to the present time. However, this review focuses primarily on the literature related to 1970 to 2000. The government documents that I studied and reviewed for this chapter included as committee reports research that the Department conducted and its annual reports, as well as related reports and writing linked to the government documents.

The review of the Alberta government's own documents for the period 1970 to 2000 revealed common themes and differences among successive Ministers of Education. These themes and differences are explored in this chapter.

Within the government documents, I sought relevant Canadian Court decisions that related to equitable delivery of educational services. However, I found only a few court decisions that influenced the Department and its policy decisions affecting educational fiscal equity. Additional information showed that the Canadian Constitution and the Bill of Rights had an impact on the policy decisions in Alberta that affected public education. These are discussed in this chapter.

I considered Alberta's economy to determine its influence on the measures that the provincial government and the Department took to deliver equitable educational services to students. To gain an understanding of the economy from the government's perspective, I reviewed the budgetary addresses of provincial treasurers and the

Department's budget and financial reports. Upon review, I did not find the documents particularly useful and therefore have not often quoted them in this chapter.

Early History of Education in Alberta (1867-1955)

To gain a fuller understanding of any topic related to education in Alberta, it is necessary to review the historic perspective dating back to the establishment of the Dominion of Canada in 1867. The basis for funding public education within the Province of Alberta is embodied in the British North America Act, 1867—Enactment No. 1 (BNA Act), or as it is called today, the Constitution Act of 1867. It held Canadian provinces responsible for the delivery of education. Section 93 of the Act states, "In and for each Province the Legislature may exclusively make laws in relation to education" (Parliament of the United Kingdom, 1867, sec. 3). Earlier, Section 92(2) of the Constitution Act stated that

> in each Province the Legislature may exclusively make Laws in relation to Matters coming within the Classes of Subjects next hereinafter enumerated; that is to say, . . . Direct Taxation within the Province in order for the Raising of a Revenue for Provincial Purposes. (sec. 3)

Three years later, in 1870, the North West Territories was incorporated into Canada. Dent (1956) reported that 10 years after the establishment of the Territories, a federal government Order in Council initiated grants-in-aid for public education:

> On November 4 of 1880, the Governor General in Council signed an order agreeing to grant aid to schools of the North-West Territories by paying one-half of the teacher's salary for any school in which the minimum daily attendance was not less than 15 pupils. (p. 11)

Ever since, local school boards have been receiving varying forms of direct assistance from parent governments (p. 11). From 1886 until 1905 the funding formula changed as territorial councils and the dominion government attempted to keep class sizes below 40 to encourage school attendance and to encourage local school boards to hire certified teachers (pp. 16-17). The changing funding formula during this period showed that proportional revenue from the Territories dropped to the point that in 1903 the territorial government was contributing only one third of the cost and local taxpayers were picking up the other two thirds. Aboriginal children were excluded when the grant system was first set up (pp. 26-27). The Public School Boards of Alberta (2001) recounted that

> in 1881 the first so-called free school in the territory was established in the Edmonton Community. A group of prominent citizens gathered together in Donald Ross' hotel on an evening in January, 1881, to discuss the schooling of the children in the community. By the end of the evening they had decided that they should establish a school which would be open to all children, including native children, without tuition or other charge. The school would be funded by a "subscription": the prominent people in the room decided what they and every other landowner in and around the settlement could afford to pay, and set down a sum beside each name. The first public school in the territory was established before any territorial legislation existed to legitimate the establishment. The first property tax in the territory was levied and collected before any territorial legislation existed to legitimate it. (¶ 3)

One of the people present at the meeting was Frank Oliver. This initiative likely provided him with the incentive to promote the idea of universal schooling in front of the North West Territories Council, of which he was a member.

According to the Public School Boards of Alberta (2001), Frank Oliver introduced An Ordinance Providing for the Organization of Schools in the North West Territories to the Territorial Council in 1883; it was proclaimed law in 1884. The Ordinance outlined an "institutional model established to support the provision of universal schooling in the territory [that] was essentially imported, from Ontario and Quebec" (¶ 5). The Ordinance allowed a Board of Education, with Roman Catholic and Protestant sections, that granted equality-to-access schooling for all participating students, which was paid for by the Territory. Each section was granted powers to control and manage schools through teacher certification, textbooks, and inspection of schools. The *Catholic Encyclopedia* (as cited in Morice, 1912) reported an amendment to the School Ordinance that altered sections related to Roman Catholic education. Morice wrote that an equitable arrangement granted that "the Catholics settled therein [and were] accorded the right of having their own schools without contributing to the maintenance of any others" (¶ 8). In 1892 this right "was abrogated by an ordinance of the territories, which decreed the neutrality, from a denominational standpoint, of all the schools of the Far West" (¶ 8). A compromise was reached through the efforts of Sir Wilfred Laurier—

when Alberta became a province in 1905. Morice stated that the original arrangement of 1875 for Catholics was satisfactory; they did, however, regain "'appreciable advantages,' which included the authority to tax Roman Catholics for the purpose of education" (¶ 8), and in 1905 Catholics were allowed to establish and operate schools of their own in the same manner as the public schools operated. If the Catholics formed the majority, they were deemed to be the public school district, according to Morice. He concluded that the advantages gained were the result of the Legislative Assembly of the North West Territories enacting Chapter 29—An Ordinance respecting Schools, which acknowledged separate Roman Catholic schools in Section 8: "There shall be an educational council consisting of five persons at least two of whom shall be Roman Catholics to be appointed by the Lieutenant Governor in Council" (Legislative Assembly of the North West Territories, 1901, p. 3). The ordinance acknowledged a variety of schools under the control of the Department . According to Section 4, "The department shall have the control and management of all kindergarten schools, public and separate schools, normal schools, teachers' institutes and education for the deaf, deaf mute and blind persons" (p. 2).

Children aged 6 to 16 were expected to attend school each year between the first of September and the end of June, as defined in Sections 132-135. Hence, there was an equal expectation that children would attend school up to Standard V. A previous section, 131, stated, "No fees shall be charged by the board of any district on account of the attendance at its school of any child whose parent or lawful guardian is a ratepayer of the district" (Legislative Assembly of the North West Territories, 1901, p. 27). The Ordinance further stated that a school board could charge parents a set levy prescribed by the statute if their children attended school in their Standard V year. In the event that a person resident in the district was unable to pay the taxes for a child's education past Standard V, Section 95(16) gave the board power

> to exempt in its discretion from the payment of school taxes wholly or in part any indigent persons resident within the district and where deemed necessary to provide for the children of such persons text books and other supplies at the expense of the district. (p. 19)

Through these provisions children received a statute-based level of equal treatment. They could attend school without fees until they completed Standard V. A school board could waive taxes for residents who were unable to pay their taxes if they had school-aged children. Textbooks and supplies were at the expense of the district. Thus, children rich or poor could attend school with equal access.

An additional piece of legislation, the School Grants Ordinances of 1901 changed the grant structure dramatically. Differing funding levels were established for rural schools than for village schools. Rural schools received more favourable funding to encourage students to attend school at increased levels than had previously been the case (Dent, 1956, pp. 22-25). Although this provision introduced inequality, it did introduce the notion of equity for rural students by using unequal funding to encourage rural children to attend school at a rate that, it was hoped, would be similar to that of their urban counterparts.

Within the 1901 School Ordinance (Dent, 1956) are the beginnings or foundation of the concept of equal access to education. Such access was intended for all students regardless of religion or parents' ability to pay fees. The Department was also responsible for providing education services to deaf, deaf-mute, and blind students. When the Province of Alberta was incorporated in 1905, the Alberta government inherited Chapter 29—An Ordinance Respecting Schools, which had governed public education in the Territories until that time. It carried forward the foundational concept of educational equality for all children defined by the earlier North West Territories School Ordinance of 1901 (Legislative Assembly of the North West Territories, 1901).

The Province of Alberta, established in 1905 by an Act of the Parliament of Canada and Section 10 of the Alberta Act of 1905, transferred powers from the Lieutenant Governor of the North West Territories to the Lieutenant Governor of Alberta (Parliament of Canada, 1905). This transfer of powers included An Ordinance Respecting Schools. Premier Rutherford led a newly elected Liberal majority into the first Legislative Assembly. This first Alberta government established, under Sections 92(2) and 93 of the BNA Act, An Act Respecting the Taxation of Land for Educational Purposes (Alberta Government, 1907, p. 311). Money raised under the provisions of this

Act was apportioned to education, with 20% going to the provincial university and the remainder to schools "organized under the provisions of *The School Ordinance Act*" (p. 11). It is interesting that when the Department appropriated funds through An Act for Granting to His Majesty Certain Sums of Money for the Civil Service for the Financial Year ending the Thirty-first Day of December 1907, it was granted $12,180 to operate the Ministry of Education, while funding granted for education totalled $365,675 (p. 8). Trustees had, as part of their duties, the responsibility to set rates for school taxes to supplement funds received from the province. "By the end of 1911, 1,765 public (and a handful of separate) school districts had been erected in the province and another 245 were created in 1912" (Ell, 2002, p. 12). Amendments to the School Ordinance in 1913 resulted in the School Assessment Ordinance and the School Grants Ordinance, which were amended annually. A change in 1913 of the School Grants Ordinance assured all students of free education past Standard V up to high school age level (Dent, 1956, p. 33). In addition, grants to schools that offered nonacademic programs, such as agriculture and technical courses, were made available (p. 36). In 1917 the Alberta government established a school in Edmonton to provide an education for "mentally defective children" (p. 39). These changes extended the norm of equality being offered students in the publicly funded school system. The Liberal government remained in power through each subsequent election until it was defeated.

In 1921 Alberta elected a new government that was led by the United Farmers of Alberta (UFA). The following year an amended School Act was proclaimed; it brought a change in name and consolidation of the amendments made to the 1901 School Ordinance inherited from the Northwest Territories. In 1925 the School Act lengthened the school year to conclude at the end of June rather than early in June. The Education Tax Assessment was amended in 1926 to reduce the assessment from 1.5 cents per acre to 0.75 cents per acre. Another amendment to the Tax Ordinance included an idea being discussed in the United States: "Equalization of educational opportunity through greater support to the schools of poorer areas . . . was compensated by a special grant if the assessment was below $75,000" (Dent, 1956, p. 54). In 1930 "the first sight-saving class in Alberta was set up in Calgary and provided a grant of $875" (p. 56).

During the 1931 sitting of the Legislature, the School Act was once again amended and consolidated (Public School Boards of Alberta, 2001). In the same year the Tax and Rate Collection Act made the taxation procedure for education uniform amongst the school districts. The act transferred the levy and collection of taxes for education to the respective municipal districts that had school districts within their boundaries (Province of Alberta Department of Education, 1931, p. 9). An equalization grant,

> the amount of which is related to the ability to pay taxes as indicated by the assessed valuation of property in the district, made it possible for a very large number of school districts to continue operation in the face of the adverse condition prevailing throughout the years. (p. 9)

These two measures found in the Tax and Rate Collection Act contributed in a small measure to equality amongst school districts.

The Socred party came to power in 1935. A major component of its election platform was to reduce the number of school districts and create larger school divisions. When elected, the new government changed the face of public education markedly (Carney & Peters, 1995, p. 249). This occurred under the leadership of Premier William Aberhart, who also carried the added responsibility of Education Minister. It is noteworthy that Premier Aberhart had been a principal of a high school in the CBE just prior to coming to office as Premier. The Deputy Minister of Education, Dr. McNally, when asked by Premier Aberhart for the key issues of the day, replied that there was a need for "some formula for the distribution of grants that would result in equalization of opportunity" (Weidenhamer, 1971, p. 129). In addition, McNally told the Premier that "reorganizing the rural school districts into large units of administration, . . . [providing] more money for teachers' salaries, [and] . . . bring[ing] all teacher education under the jurisdiction of the university" (p. 129) were the important issues that needed attention. Aberhart and his Cabinet, in response to their election platform, reorganized rural school districts through an amendment to the School Act in 1936. This resulted in the creation of rural school divisions. "By 1943 most rural school districts belonged to one of the 50 large school divisions. As a consequence, students' opportunities for education in rural areas improved, as did opportunities for rural students to attend high school" (Ell, 2002,

p. 30). Equalization of opportunity through a new tax formula, as McNally had hoped, did not occur at that time. McNally reported that Aberhart told him, "You know that there isn't any money, so let's concentrate on [the reorganization of school districts]" (Weidenhamer, 1971, p. 129). However, with respect to achieving any further improvements regarding equality or equity, no change of significance occurred for some time. The provincial government continued to raise money for public education through property tax. School jurisdictions also collected property tax for public education based on local assessments, and the provincial government gave grants to school boards based on a per-pupil count.

Alberta reported an oversupply of teachers in 1936. This led the Minister of Education, William Aberhart, to report that

> the Department believes that with an over-supply of teachers the time has come to exercise greater care in the selection of those who are accepted for training for the work of teaching. To that end admission to Normal School next fall [1937] will be restricted to those holding the Grade XII certificate. (Province of Alberta Department of Education, 1936, p. 8)

Aberhart, who proudly held a Bachelor of Arts degree, believed that teachers should have the best of credentials. This move to improve teachers' qualifications was a way of improving instruction in the classroom, not only in urban centres, but also in rural areas of Alberta. In turn this may be seen as providing a uniformity and equality of instruction. By 1942, just following Aberhart's death, the overabundance of teachers changed to a shortage.

Dr. Fred McNally, the Deputy Minister at the time that Aberhart became Minister of Education in 1936, retired in 1946. The annual report of the Department that year highlighted that

> 1946 must be recorded as having been a most difficult year. . . . The continued and increased shortage of teachers has not only deprived thousands of children of proper educational opportunity but has imposed upon school authorities . . . a great burden of effort, worry, and public discontent. (Province of Alberta Department of Education, 1946, p. 9)

Over the following years, into the 1950s, the annual reports of the Department continued to refer to a shortage of teachers to staff Alberta classrooms. The most notable item in the annual report of 1955 was the Emergency Teacher Training Act, which had been proclaimed in 1954. This statute outlined a program for summer sessions to train teachers. The 1955 report spoke of the success of the program, but stated that the shortage of fully qualified high school teachers was still acute (Province of Alberta Department of Education, 1955, p. 8). Aberhart's dream to improve the quality of teachers might have been accomplished, but it might also have inadvertently caused a teacher shortage.

Equality in Alberta's Funding of Education

Weidenhamer (1971) reported that in the 1955 provincial budget address the Provincial Treasurer, the Honourable C. E. Gerhart, announced that grants for education would increase to "cover 50% of the overall operation costs of elementary and secondary education" (p. 224). In addition, "An equalization factor was in use at that time with the effect that low assessed areas would receive more than 50% while highly assessed areas would receive less that 50%" (p. 224). The Alberta School Trustees Association (ASTA) claimed to have urged this measure for the previous 10 years. Following this, the provincial government set up a Royal Commission in 1957 to review education in Alberta. Its purpose

> was established to assess the present system of education as it has evolved and is being carried out in the Province of Alberta, and [it endeavours] to formulate recommendations for the future which, in the view of the Commissioners, [would] improve the quality of education and make it more effective in meeting modern needs. (Province of Alberta, 1959, p. xi)

Equality of opportunity was one of the issues addressed. The Commission reported:

> Equality in the sense of appropriate educational opportunity for all youth was of general concern—for example:
>
> 1. All students presently do not have equal opportunity to develop their abilities to the fullest capacity.
> 2. All should have equal opportunity, whether gifted, normal, below average, or physically handicapped.

> 3. Towards this end, a diversity of educational programs (matriculation, general, business or commercial, technical, vocational, fine arts, agricultural) is preferable to identical education through a common program. (p. 10)

Of the 323 recommendations that the Royal Commission made, six appear to have addressed equality:

1. [that] texts be sequenced for the benefit of adapting the curriculum to meet individual differences (recommendation 48) (p. 297),
2. [that] teachers be required to enter teaching with a minimum of four years of university and a degree (recommendation 140) [to give all students across the province access to teachers trained at a bachelor's level of university education] (p. 304),
3. [that] guidance counsellors and health services be made available to all schools (recommendation 192 and 202) (pp. 309-310),
4. that the Provincial Government assume responsibility for administration and finances relating to education of the handicapped (recommendation 211) (p. 311),
5. that the Department assume special responsibility for arranging services to handicapped children in sparsely populated rural areas (recommendation 212) (p. 311), and
6. that in the event that the local school system is incapable of providing an adequate program, gifted children be subsidized to attend school where suitable programs are being offered (recommendation 219) (p. 312).

In general, the Commission appeared to recommend higher standards for programs that were accessible to all students equally across the province; in other words, this was a concept of program equity for individual students. Out of these recommendations and through debate within both the legislative assembly and stakeholder groups, including the ATA and ASTA, the most observable move of the provincial government was the introduction of the SFPF in 1961. Its purpose was "to provide all schools with sufficient funds to achieve a basic minimum educational program, regardless of the fiscal ability they possessed" (Kulba, 1974, p. 118). This measure moved toward funding equality amongst school jurisdictions. The SFPF grant was of equal value regardless of where the student attended school.

In his study of Alberta equalization grants, Deiseach (1974) defined *equalization in grant apportionment* as “a tendency towards equality in foundation payments per weighted pupil among districts [in Alberta]” (pp. iv-v). He cited the Royal Commission on Education in Alberta, which noted that there was a general concern over equality of opportunity for all youth in the province (pp. iv-v). When A. O. Aalborg, Minister of Education, enunciated the Alberta School Foundation Program in 1961, he included principles to make the fund an equalization type to raise local school revenues to some previously defined minimum level that covered essential services at then-current prices. School boards were expected to raise tax revenue at a common mill rate, and the balance of the foundation program was secured with a provincial grant (pp. 1-2).

The Honourable Bob Clark, Minister of Education, established another committee to report on school finance in 1969. It was charged with evaluating and recommending changes to the SFPF. One of its recommendations was that “a provincial plan for financing education should have as one of its major objectives the achievement of equalization of educational opportunity (Alberta Department of Education, 1969b, p. 4). It was endorsed by the Alberta government (Deiseach, 1974, p. 2), and a revised funding formula was introduced for a three-year period from 1970 to 1972. Deiseach noted that “while the new grant scheme differed from the previous formula in the manner of allocating funds to school board, it was intended to serve the same overall aim—to provide greater fiscal equalization” (p. 2). The committee found that, “while the supplementary requisitions remained low, fiscal equalization was generally attained. As supplementary mill rates increased, equalization was less prevalent” (Alberta Department of Education, 1969b, p. 34). Although the School Foundation Program initially may have addressed fiscal equalization, the committee found that since the early 1940s some school jurisdictions had been unable to find the highly qualified teachers needed to staff their schools (p. 21). As a result, such jurisdictions were not able to achieve the equal opportunity in the classroom that had been anticipated by the revision to the funding formula. Hence, because of a teacher shortage, equality of educational opportunity amongst school jurisdictions continued to be lacking.

In his study of the literature regarding the School Foundation Program, Deiseach (1974) drew two conclusions:

> First, the collection of school taxes through a uniform levy on equalized property assessments may not have brought about an equalization of the school tax burden in Alberta because property valuations, may not have been a good indicator of the taxpaying ability of residents.
>
> Second, there were a number of ways in which variations in foundation payment per weighted pupil to school systems could have arisen through the operation of the finance formula. Increased variability in foundation payments per weighted pupil signifies disequalization in grant apportionment in the present study. (p. 34)

However, in the final analysis, "the general conclusion on equalization in grant apportionment was that the aim of fiscal equalization of school board revenues was largely achieved for the majority of school systems under the Alberta Foundation Program between 1961 and 1971" (p. 80). On the other hand, the Minister's Committee on School Finance raised a number of questions about problems with equalization:

> While fiscal equalization remains a desirable objective, the Committee is doubtful that its achievement necessarily guarantees educational equalization. In fact, a movement towards the equalization of educational opportunity could result in incidences of fiscal inequality. This anomaly must be fully explored to discover its implications. (Alberta Department of Education, 1969b, p. 51)

The committee suggested that the foundation program of the day funded small schools and small school systems in a manner "inimical to the equalization of educational opportunity" (p. 54). It recommended that an escalation factor based on an education price index be established and that the school foundation program incorporate such a factor into its formula (p. 45). The committee urged continuing the distribution of funding from a central provincial fund that maintained the criterion of local autonomy and provided a view of an educational plan for the province: "Expenditures should be related to (1) the teaching process itself, (2) support for capital expenditures on the necessary buildings and equipment, and (3) the costs of transporting students from their homes to the schools in the Province" (pp. 38-39). This was the final report that the committee prepared for Bob Clark, Minister of Education. When the committee met next, a new minister received its report, and a new government under the leadership of Premier Peter Lougheed was elected.

Transition in the Alberta Government (1970-1971)

Since 1970 governance and financing of public education in Alberta has changed and adapted in response to the various policies of the Alberta PC government. Educational fiscal equality, one of those policies, may have been considered an elusive target by previous policy makers in Alberta, but a goal that governments in Alberta continued to attempt to achieve.

A review of the Department's annual reports revealed that efforts to address equity amongst taxpayers and students continued to be studied and changed during Clark's tenure as minister. This was most evident in the *Report of the Minister's Committee on School Finance* (Alberta Department of Education, 1969b) that laid out seven principles underlying an adequate financial plan for support of provincial education:

> 1. A provincial plan for financing education should have as one of its major objectives the achievement of equalization,
> 2. A financial plan should provide for a diversification in revenue sources and a reduction in the dependence on the property tax as a major revenue source,
> 3. A plan for school support should recognize the importance of maximum local autonomy for school boards consistent with provincial responsibility for minimum standards of program, teacher certification, and buildings,
> 4. Local school jurisdictions should be free to raise money for the financing of school programs not provided for in a provincial plan of school support,
> 5. A provincial plan should be designed to achieve an educational program which may be defined as the province's educational plan,
> 6. The province should provided leadership to local jurisdictions towards the improvement of the educational services. This leadership may take the form of incentive grants to be provided in a manner that will not seriously disturb the principal of fiscal equality, and
> 7. Support for expenditures on capital and transportation should be provided in the province's financial plan. (pp. 5-7)

Under Bob Clark's ministry, "virtually all the legislation governing the public school system [was] revised" (Alberta Department of Education, 1970, p. 7), wrote Deputy Minister T. C. Byrne. The new School Act was drafted to "shift educational decision-making from the provincial to the local level" (p. 7). Byrne continued, "More than ever before [local school boards] have been licensed to establish their own spending priorities" (p. 8).

The following year, 1971, then Deputy Minister Dr. R. E. Rees reported that Dr. W. R. Duke, Associate Director of Field Services, was continuing work on a planning project to "make it possible to analyze expenditures, make province-wide comparison, and to devise provincial financial plans for education on a realistic and factual basis" (Alberta Department of Education 1971, p. 7). They also hoped to improve equity.

Dr. Duke continued to analyze expenditures, made province-wide comparisons, and devised provincial financial plans. His research was important in discussions within the Department because he ventured to improve the financing of public education as well as fiscal equity and equal educational opportunity (Alberta Department of Education, 1971, pp. 10-11).

Dr. E. K. Hawkesworth was appointed Associate Deputy Minister of Education, and Dr. Duke became the first Associate Director of Field Services. These new appointees played important roles in making improvements in fiscal equity in the Alberta public school system.

During the 1970-1971 school year, the School Foundation Program continued to use the classroom unit (CRU), which had been established in 1969. However, the CRU was alleged to have caused financial difficulties for small school districts, as reported in the Department's 1970-1971 annual report. This problem persisted in spite of additional financial assistance to the smaller school systems of the province (Alberta Department of Education, 1971, pp. 10-11).

Government Documents From 1971 to 2000 Reviewed

The remainder of the chapter is arranged into four themes: definitions and beliefs, equal educational opportunity, policy and legislation, and fiscal equity. I gathered findings that were relevant to the research from government documents, which included the Department's annual reports, various committee reports' recommendations, and other related government literature.

Policy, Definitions, and Beliefs

Policy and Legislation

In June 1972, within the first year of being appointed Minister of Education, Hyndman received the findings and recommendations of the Minister's Advisory Committee on School Finance (MACOSF; 1972). Its statements of belief and a definition of equalization of educational opportunity are as follows:

> All children, regardless of variations in their ability, talent, physical condition, cultural background and other variables have a right to an education to meet their individual needs. The provincial plan should assure that the opportunities for students to meet their individual needs will be the same across the province, to the greatest extent possible. (p. 9)

In the same paragraph, the committee made its recommendation for supporting the equalization of educational opportunity through fiscal equity measures:

> In part this implies that irrespective of its capacity to raise support, the local district should have access to funds sufficient to provide an adequate program of education for its youth. This means placing at the disposal of poorer jurisdictions provincial financial assistance so that revenues are comparable to those available to wealthier districts. (MACOSF, 1972, p. 9)

Additional principles to implement this recommendation in public education were proposed: to diversify revenue sources, to promote local autonomy for school boards, to provide the opportunity for local school jurisdictions to raise money to finance their programs, and to have the province provide leadership through development grants that promoted local school jurisdictions to improve educational services (pp. 10-13).

Alberta Education (1988) made a similar statement in the 1987-1988 annual report:

> The Deputy Minister [Dr Reno Bosetti] and his staff considered ways in which equitable educational opportunities could be provided for all students in Alberta, wherever in the province they may live. They looked at ways of achieving "fiscal equity"—compensating for differences in wealth (and expenses) among school

> boards throughout the province. They also made plans in support of "program equity"—ensuring that the best possible instruction is available to all students. (p. 4)

Nancy Betkowski,[5] Minister of Education during this same year, brought in a new School Act. The Department was facing budgetary restraints because of its growing deficit.

Dinning wrote a 'Message from the Minister' in the 1988-1989 annual report of Alberta Education (1989), the first message from the Minister found in an annual report. Within his message he defined equity, a concept similar to that found in the 1987-1988 annual report:

> Excellence. Equity. Efficiency. These three themes guide our efforts to prepare students for the world they will encounter. . . . Equity is inextricably tied to excellence. It means striving to ensure that all students, regardless of their circumstances or location in the province, have access to a high quality education. (p. 4)

He stated that these three areas "add up to a strong personal commitment by your Minister of Education and an equally strong commitment by the Department staff, in partnership with school boards and teachers" (p. 5).

The provincial government's deficit, a concern voiced by the previous Minister, Betkowski, continued. This was the reason that Jim Dinning wrote about a third focus, efficiency, and the need to use resources as economically as possible in light of restraints caused by the government's budget deficit. Despite the deficit, Dinning asserted that education continued to be the government's first priority.

In Dinning's last year as Minister, Dr. Reno Bosetti wrote in the 1992-1993 annual report (Alberta Education, 1993) that

> the priority for Alberta Education was to ensure that all Alberta students have an opportunity for a quality education. Achieving that goal is based on the continued search for innovation and improvement in the education system, and a continued emphasis on increased efficiency in the delivery of education. (p. 6)

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[5] Nancy Betkowski used the last name of MacBeth between 1993, when she did not run for political office, and 1998, when she returned as the Liberal party leader. For this study Nancy Betkowski will be referred to as *Betkowski* for the sake of consistency and clarity.

Research

Research was of interest to the Department and supported by Minister Hyndman. One example was in the area of finance, where the Department actively evaluated and studied education funding as well as the effectiveness and efficiency of delivery of funding programs at the school district level. Dr. Duke analyzed current programs, conducted research into the structure and effects of programs of financial assistance to school boards, and prepared statistical reports that showed the trends and demands for education (Alberta Education, 1974, p. 88).

The Minister established the Minister's Advisory Committee on School Finance (MACOSF; 1975), which was

> charged with the responsibility of studying the education finance plan in place for the period 1973-1975 inclusive, for the purpose of recommending changes. The Committee commissioned eight studies which together with other data sources provided a basis for thirty-seven recommendations. (p. i)

This committee was made up of individuals who represented the Department, the academic community, and recognized stakeholders, and had met in 1969 and 1972, as previously mentioned in this chapter. In May 1975 the MACOSF "held that there was no apparent need for a major overhaul, but rather an up-dating, refinement and extension of the existing plan" for financing delivered to school boards (p. 3). The principles set out in the MACOSF's (1972) report were reaffirmed. However, the view of equal opportunity was slightly different from that voiced in 1972:

> Equality of educational opportunity was viewed primarily as equality of access of students to programs and services rather than equality of outcomes. Equality of educational opportunity does not necessarily mean equality of results. Further, equality of educational access implies availability of educational programs and services which are not a direct function of local factors, particularly financial ones. (MACOSF, 1975, p. 5)

With regard to educational finance plans for Alberta, although the committee maintained that it preferred that funding come from "balanced access to all revenue sources" (MACOSF, 1975, p. 5), it was necessary to continue to receive revenue for public education from the local property tax base. Property tax, it was held, was a stable revenue source, and "the local ratepayer [could] . . . identify directly with educational expenditures" (p. 5).

Local autonomy remained an important element in the committee's principles. The freedom to mould the quality/quantity mix of local programs that were based on minimum standards determined by the Department was essential for local school boards. Hence, freedom for local boards assumed that they should have the power to raise revenue through levying taxes on property. However, the minimum standard required financial support from a basic funding formula provided by the provincial government (MACOSF, 1975, pp. 5-6). "The establishment of a province-wide program and service inventory, plus related demographic data" (p. 7) would be required to "translate an educational plan into a financial plan and still leave room for local jurisdictions to exceed the provincial educational plan" (p. 7) by levying a supplementary requisition.

The MACOSF (1975) recommended that the weighting factors for funding between elementary, junior high, and senior high be narrowed and changed to 1.0, 1.05, and 1.2, respectively, to provide a greater opportunity for elementary school funding to address the learning needs of students in their early formative years, the years that research has shown are most important to student success (p. 18).

Although the MACOSF (1975) saw the need for special purpose grants, the members believed that the number of grants was growing and becoming arduous for local school jurisdictions to track, and they considered simplicity of funding school jurisdictions necessary. In light of this they recommended that several grants (e.g., unemployment insurance and Canada Pension Plan allowance) be coalesced into the SFPF grant (p. 20).

An example of delivering program equity through funding provisions was demonstrated when fine arts drew the interest of the committee. It suggested that there was a need for a strategy to fund schools across the province to ensure that all students in Alberta would have access to "some measure of exposure to and stimulation from the full range of the Arts" (MACOSF, 1975, p. 31).

Declining enrolments were of concern for the committee (MACOSF, 1975, p. 35). Because grants were proportional to the number of students in a jurisdiction, in the event that the number declined in the jurisdiction or in a school, these grants would decline. However, the grants declined at a much more rapid pace than did the accompanying costs. A simple example is that it costs the same to heat a school and have teachers in classrooms even though the numbers in each grade have declined; thus the per-pupil grant money will decline even though the loss of students is not enough to close a classroom.

The government acted on all of the MACOSF's (1975) recommendations over the next 10 years.

Besides the research done by the MACOSF (1975), the Director of the Finance, Statistics, and Legislation Branch conducted research related to finance that included developing financial allocation and distribution formulae, an ECS teacher competency study, and school board expenditure analysis (Alberta Education, 1976, pp. 12-13). In 1982 the director wrote of "developing and drafting the 1982 SFPF Regulations and the 1982 the Department Grants Order . . . [and] revising and researching various aspects of the existing education finance plan" (Alberta Education, 1981a, p. 4).

In June 1979 a study based on a number of projects was undertaken to research and report on the topic of financing K-12 schooling in Alberta. The study's objectives were to "enhance the Department's capacity to plan successfully; to facilitate informed public discussion of issues in Alberta school finance; and coincide with well-established and widely-accepted provincial finance planning cycles" (Alberta Education, 1981a, p. 1). The purposes of the projects were to

> design new and better analytic techniques for exploring the probable consequences of selecting alternative provincial finance plans; and assemble basic information concerning selected aspects of school financing in Alberta, which [could] provide a fuller appreciation of the extent and precise nature of school finance problems. (p. 1)

The implications and recommendations of the study addressed finances: revenue and expenditures, costs, curricular programs, teacher/class data, enrolments, the relationship between the finance plan and the education plan, simplification of the School Grants Regulation, and mechanisms for planning. The recommendations for study on financial issues were designed to

1. Explore alternative bases for differential funding, perhaps related to jurisdiction, type, size or location.
2. Develop a better or more widely accepted measure of "equity," or at least others in addition to assessment per pupil, such as personal income per pupil.
3. Examine the impact of changes to provincial school finance arrangements on individual school jurisdictions. (Alberta Education, 1981a, p. 5)

With respect to costs, it was recommended that the Department "examine and isolate the reasons . . . for observed differences in cost per pupil in plant operation and maintenance, transportation, and administration among Alberta school jurisdictions" (Alberta Education, 1981a , p. 6). The relationship between the finance plan and the education plan was addressed to "explore the desirability of specifying the education plan which could form the basis of all forms of regulated funding" (p. 6). Simplifying the scope and complexity of the School Grant Regulations appeared to be a goal, and information on teacher characteristics and class sizes was needed to help to understand the needs of education in Alberta (p. 6).

Ratsoy et al. (1981) from the Department of Educational Administration at the University of Alberta submitted a report to the committee on financing schooling in Alberta. It stated that common factors could be identified that included legal provisions in school statutes, a basic curriculum, a system of rules and regulations, special services from Alberta Education, and a basic grant system (p. 40). The authors argued that

> the paradox is that equal treatment, unless the parties are already on an equal footing, simply perpetuates and may even exacerbate existing inequalities. Recognition of this fact led in the past to foundation program funding being supplemented by developing a system of special grants. (p. 40)

They proposed measures to determine the success of fiscal equalization grants:

- participation of the number of jurisdictions who were able to take advantage of the grant,
- ability to pay which meant those jurisdictions with large equalized assessments should receive smaller per-pupil allocation than those with lower equalized assessments.
- need based on the economies of scale that would see larger school districts receive smaller per pupil grants than smaller districts who could not benefit from this principle.

- sparsity is an element that considers the distances and population density of a school jurisdiction. (pp. 42-43)

These four measures determined that not all of the Fiscal Equalization Grants provided through the Alberta School Grants Regulation produced general equalization expectations (pp. 43-44). One of Ratsoy et al.'s conclusions was that "projections based on recent experience and expected trends indicate that property taxes will provide an increasing proportion of school board revenues in the next few years" (p. 122).

Ratsoy et al. (1981) projected that taxes—in particular, supplementary requisitions—would increase at a faster rate than incomes and prices would. However, the share of educational taxes contributed by farm properties were predicted to decline compared to residential, commercial, and industrial properties, which would affect the ability of rural school boards to raise revenue through local supplementary requisitions (p. 122). Their conclusions were well founded because their predictions came true over the years following the study.

Financing schooling in Alberta: Stage 2 (1982). As a result of the *Financing K-12 Schooling in Alberta* report (Ratsoy et al., 1981), King set up a task force under the chairmanship of Dr. J. S. Hrabi that made recommendations for improvements to the funding of K-12 schooling (Alberta Education, 1982c, p. 3). The nature of funding had changed since 1969 when school boards relied almost exclusively on funding from the province out of the SFPF, which distributed money equally. By 1981, although there was still heavy reliance on the SFPF, pressure increased on the School Grants Regulations, which distributed funding differentially (p. 3).

The task force received a report from the School Grant Simplification Project in August of 1982. On issues that may touch on equity, the project recommended that grants be simplified by coalescing a number of them into the School Foundation Program. These grants included the Educational Opportunities Fund (EOF), the Learning Disabilities Fund (LDF), and day extension grants for students under the age of 21. Further, the project recommended that grants in support of special education teaching and program units be coalesced into a three-level, common, per-pupil grant formulation. However, it was clear that there should not be a reduction in funding (Alberta Education, 1982a, p. 33).

As a first step, the task force, in describing a school finance plan for Alberta, endorsed seven general principles as ideals (Alberta Education, 1982a):

> 1. Have as its prime objectives:
>   (a) the equalization of educational opportunity, and
>   (b) fiscal equalization, insofar as it is compatible with equalization of educational opportunity.
> 2. Be designed to achieve an educational program which may be defined as the province's educational plan.
> 3. Provide monies for development grants and in support of selected programs over and above the basic level of the plan, in order to provide leadership towards the improvement of educational services.
> 4. Provide a diversity of revenue sources.
> 5. Recognize the importance of autonomy for, and accountability of, local school authorities.
> 6. Avoid infringement on local choice of [the] method of program delivery.
> 7. Allow local school jurisdictions the opportunity to raise money for the financing of public education when such financing is not provided for in the provincial plan of school support. (pp. 7-9)

Principle 1 of the previous 1969, 1972, and 1975 reports of MACOSF stated that "a provincial plan should equalize opportunity for students and provide fiscal equalization for the taxpayer" (Alberta Education, 1982c, p. 9). Although implied, the task force made clear in its report that in the event "conflict [occurred] between the goals of 'equal opportunity for schooling,' and 'fiscal equalization,' then equal opportunity [would take] precedence" (p. 9). In order to address special circumstances at the local level, the task force concluded that "since the local responsibility for funding special education programs is a great expense compared to the average local cost of education a child, there is a need for local access to a broader financial resource base" (p. 10).

The task force also recognized that educators had difficulty in determining whether or not equal educational opportunity for all students across the province was a reality given that these educators had "difficulty in defining the minimum acceptable educational program to which every child [was] entitled" (Alberta Education, 1982a, p. 9). The question was asked, "What is basic education?" Finding an answer, the task force concluded, was a challenging task because of the ever-changing view of interest groups within a pluralistic society. Later in the report the task force acknowledged its inability to arrive at an acceptable definition of *basic education* in relation to a financial plan. Consequently, it suggested an operational definition: "The provincial educational program is what is happening in schools. . . . It is a function of provincial requirements, school board desires and local community aspirations, geography, and availability of financial freedom and flexibility" (pp. 22-23). The task force recommended that the government work "towards enhancing school programs and increasing their accessibility for all school jurisdictions" (p. 23).

It is noteworthy that the task force dealt with the conflict between achieving fiscal equity and maintaining local autonomy (Alberta Education, 1982a, p. 10) and concluded that special education programs were a local responsibility and that, therefore, extra local funds, over and above those supplied through special grants from the provincial government, were needed to address these needs. Although such a view promoted local autonomy, the needs of special education students would be met in different ways across the province because of the ability of wealthy jurisdictions to fund such programs, which thereby easily created an inequitable situation for poorer jurisdictions.

The topics related to equity that were common among school jurisdictions were "declining enrolments, the Supplementary Requisition Grant, regional education price indices, cost of school personnel, teacher in-service costs, and population density" (Alberta Education, 1982c, p. 12). According to the task force, the main topic that needed to be addressed was the appropriate share of funding between the province and the local school boards for local educational costs (pp. 13-21). In summary, its recommendations were as follows:

- Small school assistance should continue with the peak grants for each category being applied for enrolments below the peak.
- The Small School Jurisdiction Grant should continue only for jurisdictions with fewer than 1000 students.
- The Declining Enrolment Grant should be maintained with inflation factored in.

- The Supplementary Requisition Equalization Grant should be increased to provide 100% average yield. If adopted, this would mean an increase from the 62% yield of the day.
- Per pupil weighting factors should be narrowed even further to secondary students receiving 1.1 what the elementary students received.
- Teacher in-service was seen as needing a significant financial contribution from the province to allow teachers the opportunity across the province an equal opportunity to be in-serviced in new curriculum.
- Population density and related funding needed further study as this area was seen as more complex than could be addressed at the time. (pp. 13-21)

To seek new revenue sources and the attempt to diversify the sources of revenue was not seen as feasible or appropriate (p. 24).

Local school authorities were concerned that the 1982 provincial government funding levels were insufficient. To achieve educational objectives with insufficient funds from the government, school jurisdictions had only one avenue to increase revenues, and that was to control the local property tax rates levied for education. However, school boards took the risk of overburdening its taxpayers. Local municipalities, which also accessed local property taxpayers for funds, were also concerned with the school board increasing its levy on property. Municipal access to new tax revenue would diminish as school boards sought greater funds from the same tax base (Alberta Education, 1982a, p. 26). The task force recommended that the province increase its share of schooling costs from 66.8% in 1981 to approximately 85% in the future. This recommendation created debate and controversy in the Legislature, not only for King, but also for his successor, Betkowski.

Pupil transportation costs increased significantly after 1976, which resulted in local school jurisdictions paying the increased costs out of their budgets because provincial grants did not keep pace with the increases. The task force recommended that the support be increased to 85% of the costs of transporting students and that this level be maintained through both increased funding and efficiency measures (Alberta Education, 1982a, pp. 27-28).

In conclusion, the task force prioritized its recommendations into two categories:

> First priority: local/provincial shares of total schooling costs, distribution of assessment, local supplementary requisitions, supplementary requisition equalization grant, pupil grant weighting factors, and pupil transportation
>
> Second priority: special education, industrial education, work experience, business education costs, small school and small jurisdictions, and declining enrolments. (Alberta Education, 1982a, p. 32)

Following the task force's report (Alberta Education, 1982a), Minister King, upon reviewing it, asked several basic questions and requested that the task force reconvene to address these questions. It responded in a report addendum. King was concerned about how the provincial government could achieve 85% funding (recommendation 3), how to maintain the 85% contribution by the province (recommendation 14), and how to design a school finance plan to achieve a Department educational program province-wide (principle 2; Alberta Education, 1983, pp. 1-4). The task force addressed his questions:

- On recommendation 3 the task force responded by giving two options. One was to, "Effect a supplementary requisition rollback scheme, either as a one-time effort or in phases, using short-term controls on local supplementary requisitions" (p. 2); the second was to "select a basic expenditure level reflective of inflation, growth and provincially mandated enhancements, and include an injection of additional provincial monies" (p. 2).
- On recommendation 14 the response was for the province to take considerable leadership in matters of educational expenditure by explaining the basis of provincial grant levels and issue guidelines that would influence school board spending (p. 3).
- On principle 2 the conclusion was that an educational plan should be defined in financial terms; however, "the financial support should flow from and not dictate the educational plan" (p. 4)

1987 discussion paper: "Equity in education." In the fall of 1987 the Department circulated a discussion paper entitled "Equity in Education Financing" (Alberta Education, 1987b) in which it defined equity, presented the issues as the Department saw them, and proposed five models for consideration. During the same time period a new

School Act was being debated in the Legislature, and debate continued into the 1988 spring session. Five principles were promoted in the proposed act: access to quality education, equity, flexibility, responsiveness, and accountability (p. 1)—a similar topic to that of the discussion paper. In the discussion paper Alberta Education took the position that fiscal aspects were implicit in the five principles and were reasonable for Albertans, particularly the leadership in school jurisdictions, to have an opportunity to discuss funding and expenditures for public education. In the discussion paper, variations on the theme of equity for students were proposed as follows:

> Every student in Alberta—regardless of where he or she lives—is guaranteed a right of access to a basic education. Given that equity is a primary principle of the new legislation, some jurisdictions require more help to provide a basic education than do others. The need for equity is recognized in the current method of funding but there may be a more equitable way to provide funding. (p. 1)

Alberta Education (1987b) also discussed student equity and arrived at a definition:

> Every student in Alberta regardless of where he or she lives should have access to an education program that meets his or her needs. However, the costs of providing programs and the local financial resources available to school boards vary widely across the province. (p. 3)

Later in the discussion paper, Alberta Education presented eight principles of school finance in Alberta. Of these eight, two were directly related to student equity. Equity was described slightly differently from the previous instances and specified:

> (1) Right of Access
>
> Every student in Alberta, regardless of that student's interests and abilities, has a right of access to a quality educational program that reasonably responds to his or her individual needs. Every student must have an opportunity to acquire the knowledge, skills, and attitudes that he or she needs to fulfill personal goals and contribute to society.
>
> (2) Comparable Standards
>
> Every student in Alberta, regardless of where he or she lives, must have the right of access to a quality educational program. Students throughout the province must be treated equitably (that is fairly, reasonably, and without bias or discrimination). (p. 7)

Alberta Education's (1987b) goal was to ensure that students received equitable treatment and that school divisions would retain their autonomy by continuing to access tax revenue from their local tax base. Further, funding would be provided from the provincial treasury in an increasing percentage from year to year comparable to the local revenues raised by the school boards. Revenue would be balanced so that equity for students would improve.

Not all school jurisdictions were seen to be equal in both their ability to raise revenue and their costs associated with educating students. In the discussion paper Alberta Education (1987b) argued that school jurisdictions and their taxpayers (residential, farm, and commercial) were treated differently when it came to local property taxation, depending on their location within the province. If there was to be "an equitable" method of financing education, the government needed to "recognize these differences and ensure that school jurisdictions [were] treated fairly" (p. 1).

"In principle, any financing system must ensure that all school jurisdictions have sufficient resources available to enable them to provide their students with a high standard of education comparable to that offered in other parts of the province" (Alberta Education, 1987b, p. 4). At the time, local taxation made up a greater proportion of the total revenue needed. From 1974/75 to 1987 the proportion of the total revenue required from the local supplementary requisition had grown from 20% to 35%, and the provincial government's portion had declined during the same period (p. 4). The discussion paper identified two principles that the provincial government had to meet:

> (3) Funding Equity
>
> Every school jurisdiction in Alberta must have access to sufficient resources to provide quality educational programs that meet the needs of their resident students. Because local resources and costs vary, some school jurisdictions require more provincial funding that do others so that they can meet their students' needs.
>
> (4) Tax Equity
>
> Tax effort in support of education must be as equitable as possible, for both residential and non-residential taxpayers, regardless of where in Alberta they choose to live or engage in business. While some variations in taxes across the province are acceptable to meet local needs, people living in less wealthy areas of the province should not be forced to pay inordinately high taxes for basic education programs. (p. 7)

In relation to the financing of public education, Alberta Education (1987b) promoted four other principles:

> Every school jurisdiction must have access to some local tax revenue, the school finance plan must provide for sufficient flexibility in the allocation of provincial grants, the provincial government must support the major portion of the total cost of education, and funding for education . . . must be used effectively and efficiently. (p. 8)

It was evident that Alberta Education (1987b) saw local revenue generation as very important to meeting the needs of students throughout the province. This was emphasized by the fact that the major points of discussion were five alternative options for financing public education in Alberta (pp. 9-17). The first three alternatives, options 1, 2, and 3, presented the pros and cons of variations on keeping essentially the same revenue-generating formula, but changing the level of equity grants. Option 4 proposed full nonresidential tax-revenue sharing, with provincial and school board taxation on residential requisitions being limited. The features of option 5 were similar to those of option 4, but the nonresidential tax-revenue sharing would be limited, and the school boards would be limited in their ability to tax nonresidential property. All of the alternatives had the provincial government taking more responsibility for providing revenue and local jurisdictions taking less. Concern remained that each option would affect the autonomy of the local school boards, which in turn would mean that students' needs would be addressed differently in each jurisdiction and thereby diminish equal educational opportunity. As a result of these discussions, some changes were made, although they were not as significant as those proposed in the discussion paper.

In the 1989-1990 annual report, Dinning (Alberta Education, 1990b) reported that the government planned to examine fiscal equity among school boards, and "the development of [the] plans . . . would be initiatives that would contribute to Alberta's students receiving the best education" (p. 3).

1990 discussion paper: "Equity in Education for All Alberta Students." Alberta Education (1990c) released the discussion paper "Equity in Education for All Alberta Students" in March 1990 and defined equity as follows:

> We believe in the importance of education. Therefore, we must ensure that every child in Alberta has equitable opportunities to benefit from a quality education. Yet, inequalities exist. In Alberta, we have cases in which many people would say that the opportunities for students aren't equitable.
>
> [Equity is a] . . . concept [that] stems from the principles of social justice and fairness in the way that individuals are treated. Equity goes beyond equality, which suggests treating everyone in the same way regardless of their individual circumstances. Equity recognizes that different individuals or groups may need to be treated differently to ensure equality of opportunity for everyone. (p. 1)

The discussion paper identified many dimensions of equity for students:

- similar ranges and qualities of programming,
- access to programs that accommodated student differences,
- no discrimination against students because of the school,
- a system that recognizes and responds to the changing needs of students, and
- educational outcomes reflect the capabilities of students. (p. 3)

Canada's history (and Alberta's) of attempting to achieve equity was traced back in the discussion paper to the Constitution Act of 1867, which allowed Protestant and Catholic minorities to have schools of their own; and the commitment to equity for children with disabilities was established in the early 1900s. The Canadian Charter of Rights and Freedoms of 1982 addressed the rights of the individual, which include the right of access to an education. Alberta had to pay attention to American jurisprudence because the trends in the USA provide an indication of the types of legal issues that can arise in Canada (Alberta Education, 1990c, pp. 3-4). Alberta Education's policy was

> to provide for equity of access to a variety of educational programs and services to all Alberta students, consistent with their learning needs—regardless of the student's social, cultural or economic backgrounds, their physical, or intellectual capabilities, or because of their geographic location and the wealth of their community. (p. 5)

The paper said that "acting within the broad parameters established by the province, school boards are in the best position to establish local priorities and to meet the needs of individual children in their communities" (p. 6). However, the provincial government had the final responsibility for making sure that all children had equitable access to a quality education.

It was clearly pointed out in the discussion paper that education had some serious problems with the availability of equitable funding from one school jurisdiction to the next. Property values per student, on which tax levies were determined, varied from nearly $8,000 to more than $2,900,000, based on the range of assessments in jurisdictions in 1989. This created grave tax burdens for the low-assessment districts despite equity grants and provincial funding that was designed to lessen these variations (Alberta Education, 1990c, pp. 7-8). This inequity in local taxation was expected to grow because "taxpayers across the province [were] not treated equally and, as a result, the students in the province [did] not have equitable access to educational opportunities" (p. 11). By 1988 the SFPF provided 7.1% of the funding, general revenue provided 54%, supplementary requisitions of the local school boards provided 33.8%, and other sources provided 5.1% (p. 11).

For discussion, Alberta Education (1990c) proposed criteria and rationale that any proposals that resulted from the paper had to meet:

> 1. provide adequate funding to address the equity needs of all Alberta students.
> 2. maintain and facilitate improvement in the access and quality of programs.
> 3. recognize the rights of students and parents as guaranteed in the Constitution, Charter and School Act.
> 4. include a local contribution to educational funding.
> 5. allow for local flexibility in allocation of educational spending.
> 6. take into account the variation of educational costs among school jurisdictions.
> 7. address taxation equity.
> 8. allow leadership in the development and implementation of educational priorities.
> 9. not suggest an increase in expenditures from general revenue of the province without first suggesting an equal increase in revenue from other sources.
> 10. ensure that efficiency and effectiveness [were] criteria that determined the revenues/expenditures necessary to ensure program equity. (p. viii)

The discussion paper did not propose any models or options as did a similar discussion paper distributed under Betkowski's ministry. However, as stated, the concept of equity was not new to the Department at this time under Dinning's ministry.

Following the discussion paper, in November 1990 Jim Dinning introduced a draft discussion paper called "Education for the Nineties: A Decade of Action" (Alberta Education, 1990a) that identified 12 key initiatives; 2 were directly related to equity:

> - improve student assessment— . . . to improve and report student performance and make instruction more specific to the needs of each student,
> - implement programs for at-risk children at all levels of education, improve equity of opportunity for students. (pp. 4-5)

As a result of the discussion paper, Dinning wrote in the 1990-1991 annual report that the Department was "reviewing alternatives for giving school boards across the province equitable access to fiscal resources" and preparing an action plan that followed the special education review mentioned in the 1989-1990 annual report (Alberta Education, 1991, p. 5).

1994 Implementation Committee chaired by Wayne Jacques. Wayne Jacques, MLA for Grande Prairie-Wapiti, chaired an implementation committee that was charged by Minister Jonson in an opening letter to the committee to "develop a new framework for funding school boards in 1995-96 and beyond" (Alberta Education, 1994b, p. 1). Jonson wanted "a funding plan that will be fair and equitable to school boards and provide every student access to a quality education" (p. 1). In the report the committee recommended in a global sense that

> the framework should allot a large block of funds for instructional programs that are commonly offered in Alberta's schools. Additional funds are provided for instructional programs that are needed, but offered only by some school systems. A block of funds are to be set aside for programs and services that support instruction. This block fund was expected to provide a reasonable level of funding for the operation and maintenance of facilities, board governance, system administration, and student transportation. (p. 1)

Included in the report was a discussion paper (Alberta Education, 1994b) that was separated into the (a) instruction block, (b) support block, (c) capital funding block, and (d) the issue of transfer of funds within the support block. After the discussions that they encouraged, the implementation team's recommendations were included in the minister's plan for funding education.

MLA implementation teams, including the one that Wayne Jacques chaired, were appointed by the minister to support the key plan initiatives which included the redefinition of roles and responsibilities, regionalization and amalgamation of school boards, a framework for funding school boards, business involvement and technology integration, and an accountability framework and performance measures. The key accomplishments were as follows:

- full provincial funding of education, capital funding reduced $100 million,
- governance with a reduction from 181 school boards to 64,
- the School Act was amended to allow the province to provide full provincial funding for education,
- Career and Technology Studies curriculum was available to use in September 1994,
- the Department staff was downsized by 18%, spending was reduced from $1.75 billion to $1.54 billion, and
- primary performance measures were developed and published. (Alberta Education, 1995, pp. 10-11)

Improving equity was not listed as an accomplishment; however, full provincial funding can imply improvement. The move to full provincial funding of education established provincial education tax rates and the distribution of education tax revenue, which resolved the inequity among school divisions (Alberta Education, 1995, p. 10). This was said to meet Goal 6, which was to ensure that all school boards and schools were adequately and equitably funded.

"The Department collected education requisitions from municipalities on a quarterly basis beginning on the 15th of June, 1994" (Alberta Education, 1995, p. 31). Prior to this the local school board had collected the requisition. The strategy now was "to implement a new provincial funding framework that ensure[d] equity amongst jurisdictions, efficient and effective practices, and provision of programs and service at least cost" (p. 31). In the Department's evaluation, collecting the local tax requisition and redistributing it on a per-pupil basis accomplished the goal of achieving equity between school districts it provided an equal basic instruction grant for every student. The Department saw this amount of funding as adequate. High school funding went from a per-pupil formula to funding based on the service received by each student.

The Alberta School Foundation Fund (ASFF) took the place of the SFPF. Education property taxes, the money requisitioned from the municipalities, were deposited into the ASFF. School boards received revenue from the ASFF and were then to divide the funds among their schools (Alberta Education, 1995, p. 32). Beginning in the 1994-1995 school year, the funding from the ASFF and the general revenue of the province provided almost all of the funding for public schools. However, the bottom line that started the move towards the changes was that the Department was to "ensure that the cost of education [was] reasonable and under control" (p. 40). In addition, the Department was to "control expenditures to keep 1997 provincial education mill rates at or below 1993 weighted averages" (p. 40).

With regard to Goal 6, Alberta Education (1997a) reported that monitoring continued to ensure that funding was equitably distributed. Three studies were undertaken: one on rural transportation, another on plant operations and maintenance, and a third on sparsity and distance. These reviews determined that an additional $8 million should be allocated to improve equity funding (p. 16).

A School Facilities Task Force. A School Facilities Task Force was established and chaired by Gary Severtson, MLA for Innisfail-Sylvan Lake. According to the Department's news release in February 1997, the task force was to report to the minister and recommend improvements to the capital plan. The mandate was to

> develop and distribute a discussion paper, and will invite public feedback. The final report is expected by the end of 1997, which would allow it to be applied to capital projects requested in 1998 and approved for the 2000/01 fiscal year. (Alberta Education, 1997b)

In a subsequent news release on March 2, 1998, the task force reported to the minister that, "overall, the task force acknowledges that the current provincial capital funding system provides a sound framework for planning and managing Alberta's 1483 school facilities" (Alberta Education, 1998b, ¶ 2); however, the task force proposed that recommendations focus on

- establishing a facility management system to evaluate the condition of all school facilities in the province that will be used to plan and manage school infrastructure at the provincial and school board levels,
- establishing provincial standards, guidelines and performance measures for all aspects of school facilities,
- requiring school boards to develop long term facility and capital plans and reports of the results achieved by these plans,
- block funding modernization projects,
- monitoring the results expected from school boards' long-term facility and capital plans,
- eliminating the backlog of school facilities maintenance and modernization over the next five years,
- establishing an Innovation Fund to support innovative school capital projects, and
- examining the feasibility of public-private partnerships for providing new schools and re-using excess school space. (¶ 2)

Review of the framework for funding school boards (1999). In response to concerns that school boards raised about equity, Mar established the Framework Review Committee in 1999; it was led by MLA Wayne Jacques. The purpose of the committee was to

1. examine equity issues from a province-wide perspective to determine whether the framework is allocating funding in a manner that is fair and equitable to all school jurisdictions,
2. examine if the funding framework provides school boards with the flexibility needed to reflect student needs and delivery efficiencies while meeting local program objectives and needs, and
3. determine if further streamlining or consolidation can occur or reduce the complexity of the framework. (Alberta Learning, 1999, p. 5)

The committee reported, "There is strong support for maintaining per student funding" (Alberta Learning, 1999, p. 18). However, the committee also noted problems with funding socially and economically disadvantaged students and severe emotional-behaviour students. Salary grid placement costs, plant operations and maintenance, and sparsity and distance further complicated the delivery of funding equity (pp. 22-28). The Department adopted a few of the recommendations in the report. With respect to equity, it removed the cap on the number of severe emotional-behaviour students allowed in a jurisdiction and improved funding for specific students with special needs, but largely left the other issues unchanged and suggested that they needed further study. One of those issues was the wide variability of the average teacher grid costs from one school jurisdiction to another.

Tom Olson (1999), Business Manager of Parkland School Division, argued in a paper that he made available to the Department that certain "cost drivers" (p. 9) in each school jurisdiction caused deficits. In some jurisdictions, he believed, this was primarily a result of the average grid cost of teachers. He found that in 1999 the average cost of a teacher varied as much as $8,000 from one jurisdiction to another. It is interesting that he found that the salary grids were very similar across the Province of Alberta; in contrast. these similar grids did not correlate with the variance in the average salary costs of teachers amongst school jurisdictions. Instead, the average years of experience and years of education varied widely from one jurisdiction to another even though the jurisdictions were often adjacent to one another. Olson argued that this average teacher cost was a cost driver over which school jurisdictions had little or no control and a major variant that resulted in considerable inequities between students in various school jurisdictions.

The issue of funding school jurisdictions that were undergoing rapid economic growth was sent to a committee chaired by MLA Mark Hlady that was charged with identifying ways to make the funding model more adaptive to changing local needs (Alberta Learning 2000, p. 4).

Charter of Rights and Freedoms and Court Decisions

"In 1978, the Supreme Court of Alberta dealt with the Carriere case, which prepared the way for the mandatory practice of mainstreaming special-needs students in classrooms, a practice that came to prevail in the 1980s" (Ell, 2002, p. 56). As a result, in the early 1980s provincial educational funding broadened to include students with a variety of needs that were not addressed in the mainstream curriculum. Section 15 of the Charter of Rights and Freedoms contains equality provisions and gave the provincial government "additional impetus during the 1980s to the mainstreaming of special-needs students in Alberta classrooms" (p. 62). In addition, "section 23 of the Charter of Rights and Freedoms guaranteed minority-language rights. As a result, in Alberta the government was compelled to establish francophone programs , schools and even school boards" (p. 62).

In the Carriere court case decision of 1977, the court held that students with special educational needs had a right to be educated in their home school. The decision had an effect on the Department, as did signing into law the Canadian Constitution in 1982 and the Charter of Rights and Freedoms. These all occurred while King was Minister of Education and had an impact on future funding and expectations of government for meeting student needs at the local level.

School Act

The annual report of 1983-1984 stated that a major review of the School Act was planned to "focus on the students and will recognize that education has a 'public purpose.' The new Act will emphasize that students, parents and the community, as well as educators, are partners in education" (Alberta Education, 1984, p. 7).

In the following year the Department's 1984-1985 annual report, signed by Dr. Webber, stated that a new school act was being considered (Alberta Education, 1985, p. 7). When Nancy Betkowski was appointed Minister of Education, she took over the responsibility for preparing and delivering a bill to the Legislature for the purpose of amending the School Act, and in the 1987 spring session of the Legislature, she introduced a bill for that purpose. The debate was not completed in that session. However, in the 1988 spring session a new School Act was passed into law. One of the new School Act's fundamental aims was to provide an even and equal playing field for both the public and separate school systems in the province. The School Act of 1988 referred to "one publicly funded system of education in Alberta whose primary mandate is to provide education through its two dimensions, the public schools and the separate schools" (Ell, 2002, p. 67). The act also gave prominence to individual students and their right of access to an education.

Management and Finance Plan

The Management and Finance Plan (MFP) was described as a new approach to managing education: It placed primary emphasis on the development of policies to guide the education of children. According to the MFP, the Department was to monitor the results achieved within school jurisdictions and their operational policies (Alberta Education, 1984, p. 7). While the MFP was being implemented, Ell (2002) reported that the proportion of provincial government funding for education had dropped off in the 1980s. In response, some school boards initiated an upward shift in school supplementary requisitions to maintain per-pupil expenditures. "To gain control over expenditures and to temper school board operations, the Department introduced the Management Finance Plan in 1984" (p. 61).

The report (Alberta Education, 1984) also said that a major emphasis of the MFP was a policy-driven management system that focused on results rather than inputs and on the "development and implementation of procedures for monitoring, evaluating and reporting educational results" (p. 7). The Assistant Deputy Minister of Financial and Administrative Services reported:

> A significant change under Management and Finance Plan (MFP), in terms of simplification, was the development of a new equity grant which combined the funding previously allocated for a number of grants such as the Supplementary Requisition Equalization Grant. The new grant was designed to equalize the fiscal capacities of school jurisdictions throughout the province and to compensate for factors (beyond the control of school boards) creating inequities between jurisdictions. The new equity grant distributes funds on the basis of fiscal capacity (comparative tax base), remoteness in terms of distance from a major centre, and sparsity of pupil population. (p. 7)

Goals and Objectives: Koziak

The Goals of Education were prioritized during Koziak's tenure as minister. Alberta Education (1976) reported ongoing research related to "the structure and effects of the existing programs of financial assistance to school boards, and preparation of statistical reports indicative of trends and demands for educational services" (p. 12) that had been reported in previous annual reports. A highlight in the 1977-1978 annual report was a recommendation that the Minister of Education take forward "a statement of the Goals of Education to the Legislature" (p. 3). A major goal was the "improvement of facilities for handicapped children" (Alberta Education, 1978, p. 4).

Deficits, Consultations, and Equity

Jonson opened with a Minister's Message (Alberta Education, 1992) in the first annual report that he tabled in the Legislature:

> I am challenged in that our fiscal resources continue to decrease. It will be difficult to go on supporting every initiative in education, no matter how worthwhile. We are in an era of setting firm priorities and making difficult choices. (p. 5)

In the 1992 annual report, inequities in funding between school jurisdictions, particularly as a result of varied tax assessment wealth, had not been resolved and were an area of concern, according to Minister Jonson. Dr. Reno Bosetti identified three elements in the provincial priorities in education that touched on equity (Alberta Education, 1993):

> planning for the future in the context of increasing provincial government budget restraints, . . . assisting special needs students by developing a draft policy on their integration in the regular classroom and improving coordination of services for them, [and] . . . developing and delivering new distance learning courses. (p. 4)

Jonson (Alberta Education, 1992) wrote in the 1992 annual report that he wanted continued consultation and discussion with those involved in the education sector to address how the education system could effectively respond to the fiscal realities of Alberta in the 1990s (p. 5).

On January 17, 1994, Premier Ralph Klein "met" with Albertans via a television broadcast. He explained the deficit and debt crisis that Alberta was experiencing with respect to the provincial government's revenue and spending. His presentation compared the situation to a household in which income was outstripped by expenditures. The Premier concluded that, as a result of overspending, his government was becoming economically impoverished and that it would be beneficial to reduce government spending, eliminate the deficit, and pay down the debt. All departments in the government were affected, some to a greater degree than others. Following the broadcast, the Alberta government carried out these reductions in spending across all departments. Spending on public education was reduced, and it was restructured.

The 1993-1994 annual report (Alberta Education, 1994a) was delivered just over two months after Premier Ralph Klein's January address on television. Jonson wrote in the report that

> 1993-94 was a year of positive change for Alberta Education, during which the framework for a restructured education system in Alberta was established. Consultations undertaken this year re-affirmed that quality education, fiscal equity, accountability and administrative cost control are essential to maintaining quality education in the province. The restructuring is designed to achieve this goal.
>
> Amendments to the School Act: . . . Amendments allowed for the restructuring of the governance, funding and delivery of education services in Alberta. Included in these amendments were measures to
>
> - establish full provincial funding to ensure students throughout Alberta have equal access to a quality basic education.
> - reduce the number of school boards, shift more decision-making to schools, and provide for greater involvement by communities and parents.
> - streamline administration to allow for a more direct flow of resources to the classroom, and,
> - provide education to students in accordance with Canadian constitutional guarantees. (p. 4)

Jonson closed his message by saying that "we are moving in new directions that will ensure government's continued commitment to providing the best possible education for the province's students" (p. 4).

In "Laying the Foundation for the Restructuring of Alberta's Education System" (Alberta Education, 1994a), Dr. Bosetti, the deputy minister, wrote that "the challenge to the education system was to improve the quality of its programs and services while reducing spending" (p. 6) The past two years of consultations had given this message to the Department, he wrote. Further,

> [the] message to Alberta's education system was consistent and clear: solve the fiscal equity problem; become more efficient; reduce administration's size and spending; identify the true costs of providing a quality basic education; become more effective by focusing on results - set high standards of achievement and clear learning expectation. (p. 6)

The feedback from the consultations was that the education system needed to be restructured based on five basic principles:

1. students must come first
2. schools and school systems must be accountable to parents and taxpayers
3. more authority must be provided to schools and parents

4. administrative costs must be lowered
5. a fair system of funding must be implemented. (Alberta Education, 1994a, p. 6)

The plan had nine goals:

- Set high standards for education
- Provide more choice and increase parent involvement
- Improve coordination of services for special needs children
- Improve teaching
- Restructure the Education system
- Ensure equitable and adequate funding
- Reduce and restructure Alberta Education
- Ensure that the cost of education is reasonable and under control and
- Establish a more accountable education system. (p. 7)

Between the messages from the minister and the deputy minister, it was evident that education was going to change significantly in a time of equally significant budget reductions. Three-year business plans and a new initiative for the provincial government were expected of every department (p. 6). The Department established its first business plan that would have a different annual reporting format than had previously been used.

The 1994-1995 annual report began with a statement of responsibility for the minister, which was a "mandate . . . to provide the direction and resources required so that students have the opportunity to acquire the knowledge and skills to become self-reliant, responsible, caring, and contributing citizens" (Alberta Education, 1995, p. 1). This was the first year for the newly formatted Department business plan. The Department stated a defined focus, responsibilities, and measurable goals to:

> include focusing on what students need to learn, ensuring that high standards are established and communicated, identifying learning resources, assessing and reporting to government and the public on student achievement, evaluating the performance and cost of the education system, and implementing the goals of the government's business plan for education.
>
> Alberta Education allocates funds to school jurisdictions in a fair and equitable manner and establishes priorities for capital projects. The department ensures that adequate financial management, auditing and reporting procedures are in place in all school jurisdictions. (p. 1)

Besides the equitable and fair funding of education in the statement of responsibility, the minister in his message confirmed that students are Alberta Education's first priority. All students were to be provided an "equal opportunity to quality education" (Alberta Education, 1995, p. 5). In order to accomplish this, Jonson stated, full provincial funding was implemented, along with a New Funding Framework for school boards. The number of schools were reduced, and a cap was put on administrative spending to focus resources on the classroom (p. 5). His message closed with, "It is by using this information for the benefit of all students that we will meet the challenge of establishing an effective, efficient and accountable education system" (pp. 6-7).

The deputy minister, Dr. Bosetti, reported that a "funding framework [was implemented in 1994-1995] that ensure[d] all Alberta students [had] a fair share of education dollars, and equal access to a quality education" (Alberta Education, 1995, p. 7). He also explained, "Alberta Education worked with schools to complete the process of the regionalization and amalgamation. This major restructuring was accomplished largely through voluntary action indicating that the education community believed the restructuring was necessary" (p. 7).

On January 18, 1996 Jonson announced, "We want to create an environment for change that will enable the delivery of education in Alberta to be conducted more efficiently, effectively and responsibly. Our action plan for regulatory reform is a major step in achieving that goal" (Alberta Education, 1996b, p. 1). He set up a Regulatory Reform Task Force to

> ensure alignment of school boards' plans with government directions for education through modification or elimination of regulations, policies and other department operating procedures and practices that have become cumbersome or outdated and that get in the way of school boards doing their jobs in responding to the educational needs of students. (p. 1)

Its objective was to "reduce cost and accelerate and improve decision making in education. The intent is to create an environment for change that will enable the 'business' of education in Alberta to be conducted more efficiently, effectively and responsively" (p. 1). With this major overhaul of regulation, equity was not part of the purpose, objective, or criteria.

Mar wrote on the cover of his first annual report in 1996 that "students come first—the efforts of the entire education system will focus on providing equitable opportunities" (Alberta Education, 1996a, cover). In his message he stated:

> Our education system has undergone major restructuring to focus resources on students, the classroom, to ensure more decision-making at the local level, to increase community and business involvement and to put in place a fair and equitable system of funding. (p. 5)

Mar's message reiterated Jonson's earlier messages about the changes to education. Specifically, Mar wrote:

> Before 1995, the per-student amount that school boards had to spend was determined by the wealth of the local tax base. Large inequities existed. Beginning in September 1995, funding for all boards was based on the amount needed to provide a basic education for each student and a fair system of funding was achieved. (p. 5)

Under Goal 6, "Ensure that all school boards and schools were adequately and equitably funded" (Alberta Education, 1996a, p. 22), it was reported that the major accomplishments included the implementation of the first year of a three-year phase-in of a uniform provincial mill rate and that the provincial mill rates for 1996 in February 1996, on average, had been reduced for the second consecutive year.

Under Goal 8, "Ensure that the cost of education is reasonable and under control" (Alberta Education, 1996a, p. 27), it was reported that "the Strategy of [ensuring] that 1997 provincial residential equalized mill rates are at of below the 1993 weighted average" (p. 27). As a result of this strategy, the reported accomplishments included "[a reduction of] the 1995 provincial residential equalized mill rates to 7.30 in 1995 from 7.64 in 1993" and, "[a reduction in] the 1996 provincial non-residential equalized mill rates to 10.44 from 11.02 in 1993" (p. 27).

In an overview found in the 1997 annual report, the same themes carried forward from the original goals and objectives set out by Jonson:

> Alberta Education's responsibilities include focusing on what students need to learn, ensuring that high standards are established and communicated, providing funding to school boards on a fair and equitable basis, assessing student

> achievement and reporting results to government and the public, evaluation the performance and cost of the education system, and achieving the goals of the government's three year plan.
>
> The Alberta School Foundation Fund receives requisitions from municipalities based on the equalized assessment of real property in Alberta, and on education mill rates established by the Lieutenant Governor in Council. These monies, along with those from the General Revenue Fund, are allocated on a fair and equitable basis.
>
> Equitable funding ensures all students have equal access to the programs and services they require. (Alberta Education, 1997a, pp. 4-5)

Goal 6 in the previous five business reports was amalgamated into "Goal 1: High Quality Learning Opportunities" (Alberta Learning, 2000, p. 19). In this goal the outcomes included:

> Flexibility and responsiveness:
> - The learning system meets the needs of all learners, society, and the economy.
> - The learning system is flexible and provides a variety of programs and modes of delivery.
>
> Accessibility:
> - All Albertans can participate in learning.
> - Albertans with special needs can participate in learning.
>
> Affordability
> - Cost is not a barrier to learners participating in learning opportunities.
> - The learning system is affordable. (p. 19)

Equal Educational Opportunity

Special Education

The government had identified special-needs students prior to 1971, but the MACOSF (1972) made recommendations that broadened the definition of who should be included. The committee began by stating "children having special educational needs are to be found everywhere. Accordingly, the funding scheme required would be best based on the general need and cost for special education services" (p. 39). The categories of needs identified included opportunity classes, learning assistance, low vision, institutional trainable mentally handicapped, homebound, learning disabilities, hard of hearing, senior opportunity, and Braille students. "Weighting costs were recommended to be based on the current cost levels in 1972" (pp. 39-40).

To help offset costs for educational programs to compensate for social, cultural, and economic disparity in a school jurisdiction, the MACOSF (1972) recommended that a provincial plan include additional grant money "to ensure that all children, regardless of differences in their ability, talent, physical condition, and cultural background, receive an education that [would] satisfy their individual needs" (pp. 42-43). Further, the committee recommended that programs be supported that were of a compensatory nature delivered by school boards and that further research be undertaken to determine how compensatory programs might be supported.

Furthermore, educational quality improvement was to be encouraged through special matched grants where school jurisdictions took the initiative. The committee recommended that research and programs that would lead to improved effectiveness and efficiency be rewarded and supported by provincial funding (MACOSF, 1972, pp. 44-45).

While Hyndman was minister, other initiatives taken by the Department further affected equity for students. Funds became available for students with various handicaps, including the deaf and the blind. The 1972 annual report stated, "Government action included the provision of an additional million dollars for the education of handicapped children" (Alberta Department of Education, 1972, p. 6). In 1974 a Learning Disabilities Fund (LDF) was established, along with a number of other funding arrangements such as the Elementary Opportunities Fund (EOF) and the Learning Incentive Program (LIP) (Alberta Education, 1974, p. 56). With the introduction of these funding arrangements, school boards complained that too much paperwork was required to access these special funds; however, 75% of school boards supported the concept despite their concern with a perceived loss of autonomy .

In the second year of Minister Koziak's term as Minister of Education, Alberta Education (1976) reported "extensive research in the areas of special education, discipline, northern education, and quality of education services" (p. 9). Dependent handicapped, multihandicapped, and other handicapped children received special grants, and their teachers received inservices designed to better address the needs of their special-needs students.

In the 1978-1979 annual report, special education gained prominence with its own section (Alberta Education, 1980, pp. 32-33). Regulation changes were drafted for Special Education Teaching Position Grants and Program Unit Grants (PUGs). Special-education materials not available elsewhere were produced for distribution by the Special Education Materials Resource Centre. The Alberta School for the Deaf underwent a number of firsts, according to the report:

> The purpose of the Alberta School for the Deaf (ASD) is to provide education and special related services to deaf children, ages three to eighteen, to prepare them to be independent, self-sustaining and contributing citizens of the Province of Alberta. (p. 33)

In the 1980-1981 annual report, Dr. Hawkesworth, deputy minister, reported that special education had a number of major achievements (Alberta Education, 1981, pp. 3-4) that included the completion of a curriculum guide for the educable mentally handicapped, and the Department was in the process of developing curriculum guides for the dependent handicapped, trainable mentally retarded, and visually impaired (p. 3). Further, the report stated that the Department was "delivering services for the sensory multi-handicapped through contract with the Calgary Public School Board" and "establishing in Calgary a Southern Alberta Materials Resource Centre for the visually impaired" (p. 3).

During King's time as minister, the Department began to address the needs of exceptional students. The 1984-1985 annual report, which was signed by Dr Webber, a newly appointed minister, stated that "services provided to exceptional students, continued to improve" (Alberta Education, 1985, p. 7). However, the initiative was not completed until the year that Jonson was appointed Minister of Education. The 1992-1993 annual report announced that the provincial policy on the educational placement of students with exceptional needs had been completed and that the coordination of the Services for Children project was once again being attempted (Alberta Education, 1993, p. 4).

The Assistant Deputy Minister of Finance and Administration reported that "the division played a direct role in developing a special education equity grant. This grant addresses the uneven distribution of severely handicapped pupils in Alberta" (Alberta Education, 1987a , p. 7).

In the 1989-1990 annual report, Minister of Education Dinning announced a thorough review of special education because he wanted to ensure that special needs received the support and education that they needed to "become active participants in the life and future of the province" (Alberta Education, 1990b, p. 3). He also wrote that high-needs programs would be an initiative that would contribute to Alberta students' receiving the best education.

Oberg, in his message in the 1999-2000 annual report, confirmed that the Department remained committed to "ensuring supports are in place for students with special needs" (Alberta Learning 2000, p. 4). As a result of the recommendations of the Jacques report, commissioned by Mar, the caps were lifted on funding special needs.

Elementary Education: The Formative Years

Early Childhood Services

In the 1972-1973 annual report, Dr Hawkesworth, Deputy Minister of Alberta Education, reported that an Early Childhood Services Branch had been formed "to implement and coordinate new government programs for the development of pre-school services to children" (Alberta Education, 1973, p. 6). Programs designed to provide specialized services to the learning handicapped were implemented. They were intended through special grants of $10 per elementary child to school boards to fund "the services of qualified persons for the purpose of diagnosing and assisting children with perceptual and learning disorders" (p. 8).

Programs in ECS expanded to serve approximately 24,500 children by 1974. Departmental research continued to examine support for school boards, the effects of the current programs of financial assistance, and trends in demand for education services (Alberta Education, 1975, pp. 9-13).

Elementary Funding Increase

Until 1971 elementary classrooms had traditionally been funded at levels that were lower than those for high school. The weighting factor for funding elementary classrooms had been 1.0, compared to 1.8 for senior high, and in 1972 the MACOSF recommended that the factor change from 1.0 for elementary classrooms to 1.2 for junior high and 1.4 for senior high. This recommendation arose from "growing evidence that the emphasis in education should be placed on the formative years" (p. 36). This change in thinking reflected the belief founded on evidence that the elementary years of education were more important than previously thought, and it also gave rise to a more equitable arrangement for funding education across all of the grade levels.

School boards established policies at the direction of the Department that would support the trend to place "disabled students into school programs and activities with non-disabled peers" (Alberta Education, 1994a, p. 25). Wetaskiwin, Edmonton, Calgary, and Lethbridge had implemented the Coordination of Services for Children, an initiative to improve the delivery of services for children and their families. It had been in the planning stages for the past three years.

Funding access for students with severe disabilities increased by $17 million in 1997, an increase that was part of the $2.8 billion expenditure for education. The annual report confirmed that this was part of the reinvestment in education (Alberta Education, 1997a, p. 5).

In Dr. Oberg's first annual report for the 1998-1999 year, he highlighted a Student Health Initiative that would provide $25.6 million annually for approximately 73,000 students from kindergarten to Grade 12. The Early Literacy Initiative, a program introduced under Mar, would provide programs to meet the needs of young children and students who experience difficulties in developing early literacy skills (Alberta Education, 1998a, p. 4).

Educational Opportunities Fund

The Educational Opportunities Fund (EOF) was established to emphasize a government priority in the area of elementary education and to provide funding for compensatory education projects. This grant was a result of a recommendation from the MACOSF (1972). EOF was the first conditional grant designed to focus on and improve instruction and programs in elementary grades and provide funds in such a way that the grant could not be available for teachers' salary increases (Alberta Education, 1973, p. 8).

The 1974-1975 annual report stated that over 500 elementary and 21 compensatory projects had either been completed or were underway under the EOF, that the program evaluation had been completed, and that the development of the Declining Enrolment Funds and Supplementary Requisition Equalization Grants was complete (Alberta Education, 1975, p. 9-13). The Department also created the Alberta Initiative for School Improvement for the purpose of improving student learning and encouraging "initiatives reflecting the unique needs within school divisions" (Alberta Learning, 2000, p. 4).

Distance Learning and Technology

A first step towards program equity was taken with the development of the Distance Learning in the Small School project in southern Alberta (Alberta Education, 1988, p. 14). The Department improved the equity grant and put policies into place that "ensured local accountability, efficiency, and effectiveness, as well as compliance with provincial legislation" (p. 26).

In the 1989-1990 annual report, Dinning wrote that distance learning courses would be an initiative that would contribute to Alberta's students' receiving the best education (Alberta Education, 1990b, p. 3). Deputy Minister Reno Bosetti reported that two grant programs, the Distance Education Grants and the High Needs Grants, would improve equity in programming (p. 14).

Native Education

According to the 1983-1984 annual report, signed by Dr. Webber, a new Native Education Project Team had been established in December 1984 (Alberta Education, 1984, p. 7). Later, in an effort to provide equitable program offerings across Alberta, Project North was designed to offer students in northern Alberta similar educational opportunities through distance learning programs to those offered to students in southern Alberta. (Alberta Education, 1989, pp. 5-7).

Language Programs

The continuation and extension of elementary Ukrainian education was proposed. High-priority programs that were evaluated included ECS and special education (Alberta Education, 1976, p. 10). "Grants to assist school boards to provide English as a Second

Language (ESL) programs" were introduced for Indo-Chinese refugee children (Alberta Education, 1980, p. 3-4). School jurisdictions were advised that they could apply for English as a second language grants (p. 33), and as a result of the recommendations of the Jacques report under Gary Mar's ministry, the caps were lifted on English-as-a-second-language students (Alberta Learning, 2000, p. 4).

Fiscal Equity

Policy, Definitions, and Beliefs

The MACOSF (1975) defined *fiscal equalization* in the context of equal educational opportunity:

> Fiscal equalization among school jurisdictions can be viewed as a first approximation of equality of educational access. Finer approximations which take into account different local factors, such as wealth, lead to disequalization of financial support. The Committee held that an equitable finance plan has essentially two components: an adequate "foundation level" of funding distributed on a common unit of need, e.g., a pupil, and additional differentiated financial support based on local factors which bear on the educational program and service dollars available, e.g., local wealth. (p. 5)

School Foundation Program Fund

During the 1960s the SFPF had been established, and the government encouraged school jurisdictions to increase the qualifications of their teachers by supplying larger grants to them than to jurisdictions that required average or lower-than-average qualifications for their teachers. In 1970 the initiative changed in a manner that unintentionally disadvantaged school jurisdictions with higher-than-average teacher training. This was seen as an issue that required attention (MACOSF, 1972, p. 26).

A specific shift in funding to the SFPF during the 1972-1973 reporting year changed the funding unit for the SFPF from the classroom unit (CRU) grant, which had caused problems for small school boards, to a per-pupil enrolment grant. The grant was projected "for a three-year period to enable school boards to develop longer term future budgets" (Alberta Education, 1973, p. 6).

Another noteworthy event occurred in 1973 when the Tax Reduction Plan "in effect, refunded [to ratepayers] an amount equal to the 28 mill levy on an assessment equivalent to the value of an average residential property" (MACOSF, 1975, p. 13). The following year the levy on equalized assessment was removed completely. In 1975 the SFPF levy was reduced to 26 mills and was applied to nonresidential and nonagricultural (i.e., corporate) assessment only.

Classroom Unit and Per Pupil Funding

Within the formula for funding schools, the CRU continued to be the favoured method of funding local school jurisdictions. A method of truncation discriminated against small jurisdictions that had a number of small grade groupings of students of 12 or fewer, and a Support Staff Grant was offered for groupings of students in such truncated situations. This also disadvantaged small jurisdictions that had sufficiently large groupings to receive funded support-staff grants (MACOSF, 1972, p. 25). It was apparent that the CRU funding model worked against improving fiscal equity for small school jurisdictions.

Grants for Equalization and Equity

Equalization Grants

In 1985 Alberta Education introduced a new equity grant that

> combined the funding previously allocated for a number of grants such as the Supplementary Requisition Equalization Grant. The new grant was designed to equalize the fiscal capacities of school jurisdictions throughout the province and to compensate for factors (beyond the control of school boards) creating inequities between jurisdictions. The new equity grant distributes funds on the basis of fiscal capacity (comparative tax base), remoteness in terms of distance from a major centre, and sparsity of pupil population. (p. 7)

Declining Enrolment Grants

Sparsity of population was recommended as a consideration when a school district "had a widely distributed and relatively small pupil population" (MACOSF, 1972, p. 41). The committee believed that in such instances the costs of delivering public education to students would be higher than those in school jurisdictions where the populations were more dense. It proposed that the government determine the relative cost and apply a percentage multiplier to assist the local jurisdiction in delivering an education that was comparable to that in major population centres in the province. The declining enrolment grant was introduced in 1975 (Alberta Education, 1982b, p. 5) and continued until it was rolled into a block grant in 1984 (Alberta Education, 1984, p. 21).

Local School Jurisdiction Supplementary Requisitions

The MACOSF (1972) proposed a principle that provided the opportunity to local school jurisdictions to raise money to finance their programs, but it also raised a concern with the minister, "if the government deems direct fiscal controls to be necessary, that a system of progressive fiscal controls on supplementary requisitions be introduced which would encourage local expenditure moderation" (p. 32). It seemed that local school authorities, if they had unbridled revenue-raising ability, could encroach on the municipal taxing ability and, more important, upset the province's efforts to move towards improved equal educational opportunities (pp. 32-36).

Guidelines for local school boards were issued to control their ability to increase supplementary requisitions (Miniely, 1973, p. 10); however, the plebiscite requirement was dropped in 1973, thereby giving school boards greater opportunity to raise the supplementary requisition levy.

With regard to educational finance plans for Alberta, although the MACOSF (1975) maintained that it preferred that funding come from "balanced access to all revenue sources" (p. 5), it was necessary to continue to gain revenue for public education from the local property tax base. Property tax, it was held, was a stable revenue source, and "the local ratepayer [could] . . . identify directly with educational expenditures (p. 5).

Prior to 1994 school jurisdictions received funding from the Alberta government through the SFPF. Further, each school jurisdiction had the opportunity through a local supplementary requisition on property to raise additional funds through taxation. But because supplementary requisitions did not raise an equal number of dollars per student in each jurisdiction, the Alberta government granted an equalization fund to those school jurisdictions that were unable to raise sufficient money because of their lower property assessments. Despite this provision, the formula failed to provide true educational fiscal equity. In 1993 Murphy wrote:

> The school jurisdictions do not have equal access to revenues for the provision of equitable educational opportunities. Even more disturbing is the fact that these inequities appear to be increasing. Alberta Education reports that residential and non-residential property assessments . . . range from less than $52,000 to more than $2.9 million per student. (p. 24)

In short, there was a policy problem that was causing an inequity amongst taxpayers and required a revised method of taxation. Students also needed an equitable system that would grant them equal opportunities for an education regardless of the school jurisdiction in which they lived.

Other Funding

Following the budgetary cuts of 1994/1995, some school boards reported deficits. A $151 million one-time grant was given to school boards, the minister wrote, "to give school boards more flexibility in addressing pressure points. The funding [is to allow] school boards [the opportunity] to eliminate accumulated deficits, as well as reward those school boards that recorded balanced budget" (Alberta Learning 2000, p. 4).

Taxation and Funding Equity

In 1980 the Director of Finance reported that the Department was making an effort to assist school boards and affected groups to interpret and claim grants allowed in the Department's grants manual. An attempt to reduce the administrative requirements of the school boards that claimed EOF, ECS, and LDF grants was reported (Alberta Education, 1980, pp. 6-7). The next year the Director of Finance reported that the reduction of the administrative requirements for ECS, the EOF, and the LDF were still being worked on (Alberta Education, 1981b, p. 7).

Goal 6: Narrowing the Expenditure Gap Between School Jurisdictions

Goal 6 was to achieve an education funding system that was fair, equitable, and affordable. Annual reports announced that the goal was being achieved and was a work in progress. The first desired result was that "all school boards and schools [would be] equitably funded" (Alberta Education, 1998a, p. 50). To measure the success of a more equitable arrangement, the expenditures per student enrolled in ECS to Grade 12 in each of the 60 school boards were compared. The gap between the lowest expenditure and the highest expenditure had dropped from $18,919 ($22,582 minus $3,663) in 1992-1993 to $9,368 ($14,085 minus $5,437) in 1997-1998. Another comparison showed that the gap had also narrowed between the lowest amount spent in a jurisdiction and the average expenditure from $2,243 in 1992-1993 to $544 in 1997-1998 (p. 49).

Alberta Education (1998a) reported that Goal 6 also had a desired result of "Albertans pay[ing] comparable education taxes on properties of equal value" (p. 48). The equalized mill rates were compared in the annual report, and the gap between the lowest mill rate and the highest mill rate in a school jurisdiction had narrowed form 9.13 mills (11.37 minus 2.24) in 1992-1993 to 2.14 mills (6.95 minus 4.81). On average, the mill rate in the Province of Alberta for education had dropped from 7.52 mills to 6.95 mills, a direction that the Alberta government wanted to continue, according to the annual report (pp. 48-49). "In the 1998 tax year, about 97 per cent of Alberta municipalities are taxed at the uniform provincial equalized mill rate for education purposes (6.95 mills) and no municipality's mill rate is above the provincial rate" (p. 48). In 1999 Alberta Education reported that the annual provincial equalized assessment gap had narrowed even further, bringing the highest mill rate in line with the provincial average (p. 52).

The third desired result of Goal 6 was that "the province, school authorities and schools [would become] efficient in their use of available resources" (Alberta Education, 1998a, p. 50). Funding had been provided in blocks, and the school boards were allowed the flexibility of applying the funding towards the programs that they needed, with the exception of capped maximum expenditures for central administration, support services, transportation, and capital costs, which were at set provincial levels. The information in the annual report showed that instruction in schools received 66.2% in 1992-1993 of the funding compared to 71.9% in 1997-1998 (p. 51). Although the proportion of what was being spent on instruction was increasing, the dollar amount per student was decreasing. In 1992-1993, $29.53 was spent per student per school day, on average (p. 53).

In 1999 the budgeted amount for 1997-1998 was $29.28 per student per school day, on average. Instruction in schools took 73.7% of the funding, a drop from the 74.0% percent reported the previous year. Expenditures per student per day had risen to $30.42 in the previous year and were projected to rise to $30.76 in the 1998-1999 budget year.

The difference between expenditures per student for school jurisdictions narrowed further. The gap in 1998-1999 was $8,135, down from $9,368 in 1997-1998 (Alberta Education, 1999, pp. 52-59).

As already noted in this chapter, during 1994 the Alberta government passed legislation to collect the property tax for education in all jurisdictions through equalized assessment. Local municipalities collected the taxes and turned them over to the provincial treasury. The new policy, which had become effective in the 1995-1996 school year, stated, "All school boards will receive equal per student funding from local education property tax revenues. This funding will partially support the funding framework for school boards" (Alberta Education, 1997c, ¶ 6). The provincial government assumed responsibility for full provincial funding of education with the passage of the School Amendment Act, 1994 (Bill 19) on May 25, 1994. Bill 19 established a new trust fund, the ASFF. "The property tax revenue for education is collected from municipalities four times a year and deposited in the ASFF for reallocation to school boards" (¶ 6). In return, the government combined the money collected from property tax with general revenue and redistributed it on an equal per-student basis to each school jurisdiction. In this way the Alberta government attempted to resolve the issue of inequitable funding for students in various school jurisdictions. The new policy was also intended to address the inequity among taxpayers in various parts of the province. An information bulletin released by the Department stated that

> the tax revenues collected from municipalities' property assessments will be used to meet the local portion of the province's funding requirements. These locally derived revenues will be collected through the application of equalized mill rates across the province on all residential and non-residential properties. Uniform mill rates for the province will be phased in by 1997. (¶ 6)

In 1999 Alberta Education, under the Ministry of Gary Mar, declared:

> *The School Act* provides the legislative framework for sustaining and developing Alberta's education system. Students are the focus of the act, which is based on a set of five underlying principles.
>
> 1. Access to quality education: Every student in Alberta has the right of access to a quality basic education which is consistent with the student's attitudes and

> provides the necessary knowledge, skills and attitudes to fulfill personal goals and contribute to society as a whole.
>
> 2. Equity: All students in Alberta must have access to a quality basic education regardless of where in the province they live.
> 3. Flexibility: Within standards and policies set by the provincial government, there are opportunities for parent and student choice in the public education system. School boards, school and individual teachers have flexibility to meet the educational needs of students and communities they serve.
> 4. Responsiveness: The student is the focus of all activities in the education system: legislation, policies and practices affecting all levels must support the efforts of communities to ensure school programs and services respond to the unique needs of each child. (Alberta Education, 1999, p. 1)

This statement was reflective of what Jonson had established during his tenure. Mar maintained the position.

Other Findings Relevant to the Study

When the PC government came into power, there was a 30-mill levy on equalized assessment, and the revenue from this levy amounted $102,553,698 (Alberta Department of Education 1972, p. 9). Minister of Education Lou Hyndman initiated changes to this levy because the removal of the levy had been part of the new government's 1971 campaign platform. The levy was removed from senor citizens' property assessment in 1972 (Miniely, 1972, p. 12), from residential property in 1973, and from agricultural property in 1974 (Miniely, 1973, p. 10). The provincial government replaced the funds that had been raised from these levies with funds from general revenue. These measures to reduce the property tax caused the provincial government's contribution to education to approach 85%, up from 78.5% in 1971. This action lowered the property tax owed to the provincial government, but it did little to achieve greater equity for education. What it did do was to give local school boards and municipalities more room to tax according to a discussion paper prepared by the official opposition in 1971 (Bairstow and Associates, 1981, p. 26).

In 1993 several specific program grants were coalesced

> into a single education block grant and the allocation was reduced by eight percent from the previous year. In order to address fiscal inequities and regional disparity in the 1993-1994 year $30 million went from the provincial lottery revenues to assist less wealthy school boards. (Alberta Education, 1994a, p.13)

Conclusion

The documents that I reviewed were primarily government produced from the period defined by the research to learn what the government was saying about equity. For the most part, I did not include other documents because it was of primary interest to the research to address the question of how the government saw equity in public education and not how others outside saw equity or how they saw the government address equity.

The data that I collected from the documents proved to be significant because they revealed some of the government's measures to address equity. The documents established that the concept of equity in public education had its foundation with the BNA Act of 1867 and the North West Territories School Ordinance Act of 1884 when children were to be provided an opportunity for an education. Second, the documents have shown that the PC government began to make changes in the way that educational opportunity was made available, starting with funding improvements for students with special needs. This government moved to improve the level of university education for teachers, which led to a more equitable distribution of teachers with degrees across grade levels and across the province. According to the documents, fiscal equity also changed. Throughout the 30 years the grant structure changed in an effort to improve the equitable distribution of funding. The most dramatic change, according to the documents, occurred in the mid-1990s with the introduction of a new funding framework. The government's level of success in achieving equity was not addressed.

Over the span of 30 years each successive Minister of Education and his or her administrations attempted to achieve equitable arrangements for the taxpayers and the students in the province. The nature of research commissioned by the Minister of Education changed, as did measures that were taken to achieve equal educational opportunity for students and equity for taxpayers. The challenges that the government faced during this time ranged from budget shortfalls to budget surpluses, ratepayer inequities, school boards that wished to maintain their piece of local taxation, and changing demands and expectations from the public.

CHAPTER FIVE:

REVIEW OF *HANSARD* 1971-1999

Chapter Five is a review of *Hansard* for the Alberta Legislature from 1971 to 1999 on the specific topic of equity in education. I scanned the statements in the Legislature of each Minister of Education by perusing the *Hansard* indexes for each year according to the minister's name and then searching for subjects that related to fiscal equity and equal education opportunity. Subjects included special education, early childhood services, education finance, SFPF, and the Department's estimates, to name a few. Then I examined the selected statements and made summaries that reflected each former minister's and his or her government's understandings of the topics of fiscal equity and equal opportunity in public education. The reviews began with Lou Hyndman and then proceeded chronologically from one minister to the next until I completed the last summary of Gary Mar's statements. Within each minister's review, the topics are raised as they first presented themselves in *Hansard*. I then sorted these statements into the same categories found in Chapter Four.

I photocopied, highlighted, and then provided to each former Minister of Education prior to his or her interview selected statements that I had found in *Hansard* that were relevant to the research. All of the ministers accepted these photocopied statements except for David King and Halvar Jonson, who felt that this was not necessary. Of the ministers who were supplied the passages, only Hyndman and Betkowski acknowledged that they had reviewed the material. The others admitted that they had not had time, and they returned the material to me. I used the photocopied material to help to recall the relevant issues related to the research. On writing this chapter, I reviewed the highlighted statements and collated them into the following format.

I selected Hansard as a body of information because it provided the public view on the Legislative Assembly as to what the Ministers of Education were saying with respect to a variety of themes that are discussed in Chapters 4 and 5. The interaction between the Ministers and other members of the Legislative Assembly also provided rich data and assisted in determining the definitions and importance of equity in public education. These documents proved to be significant for two reasons: The data were relevant and presented an accurate, day-by-day discussion on topics, legislation, and funding issues related to equity; and the information proved to be valuable for me during the interviews of all of the participants because I was able to refer to Hansard and help them to remember what had happened on the floor of the Legislative Assembly of which they were a part or to which they were directly privy.

Policy and Legislation

Policy, Definitions, and Beliefs

Statements made in the Legislature on fiscal equity and equal educational opportunity, often called equity, may have reflected the beliefs and policies of the Ministers of Education and their governments. In turn, these likely influenced how the government developed these concepts of equity. The following presents a summary of the relevant statements that I found in *Hansard* on the Ministers' of Education beliefs, policies, and definitions on the topic of equity while they were in office.

Prior to the 1971 general provincial election, the PC party developed an election platform that included positions on public education that were instrumental in the direction that it took after the PCs were elected. These positions are found in the debate of the Legislature. One of the first exhibitions of this was in Hyndman's closing comments in his opening budget speech. He spoke to his understanding of equity: "The broad aim, I think, is a quality educational system and a fair shake for every student in the province irrespective of where he or she lives" (Legislative Assembly of Alberta, 1973, p. 32-1540).[6] Under questioning from MLAs in the Legislature in the spring of 1973, Hyndman elaborated on this "fair shake" when he replied that it was crucially important to maintain a public, nonsectarian education system to protect a "democratic method which has only developed in the last 150 years" (p. 44-2273). He saw this as the only guarantee of equal opportunity, a goal that might never be attained but should be strived for.

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[6] The page numbers for *Hansard*, Legislative Assembly of Alberta, from 1970 until 1973 were hyphenated; these hyphenated numbers should not be mistaken for a range of pages.

Children in areas that may be disadvantaged needed extra support, in Hyndman's estimation. For example, school facilities for inner-city students were a concern. He said during the 1973 budget debate:

> The inner-city cores, the children need perhaps even more of an extra boost than they do in the new suburban areas, where we can generally say that the dimensions of education and parental guidance given are maybe greater than in inner-city areas. I think we can't simply let these schools deteriorate, and they may need over the long run even more assistance than those new ones in suburbia. (Legislative Assembly of Alberta, 1973, p. 44-2279)

When Koziak read the Throne Speech as Minister of Education in 1977, he proposed that the Legislature develop goals and objectives for education and reported that the Legislature would have the opportunity to debate the topic over the spring and fall sessions, which it did. Although this may not be seen as a move to improve equity, I argue that the concepts debated and the common language developed for the provincial education system produced a more common and equal expectation for education (Legislative Assembly of Alberta, 1977, p. 246). On May 16, 1977, Koziak introduced a government motion: "Be in resolved that this Legislature assess the goals and objectives for elementary and secondary education , and consider the priorities to be attributed to those goals and objectives" (p. 1343). His reason for the motion was that Albertans were uncertain about the goals and objectives of education. "There is no doubt that a clear statement is necessary of what students must learn in school . . . and what schools should accomplish" (p. 1343). Thus began a lengthy discussion both inside the Legislature and outside in the public; it came to a conclusion, and the motion was passed on May 15, 1978, that established a set of goals and objectives common to all Alberta schools (Legislative Assembly of Alberta, 1978, p. 1242).

David King was the next Minister of Education, and during his first address to the Committee of Supply he said, "Students . . . have a right to education in this province whether or not they suffer a handicap" (Legislative Assembly of Alberta, 1979, p. 464). King confirmed that the primary responsibility for educating children with handicaps lay with the local school board. However, the province would support the school boards in that endeavour

Three years later King reiterated his definition of equity: "We would provide provincial support unequally, in order to ensure equal access to education for all children, irrespective of their community and their circumstances" (Legislative Assembly of Alberta, 1982, p. 421). To King's mind, access to an education was the key; however, he held that local school boards were in charge of how the programs would be offered to students once they gained access. It was important to King that school boards make decisions locally and that autonomy be protected (Legislative Assembly of Alberta, 1982). He restated this in 1983: "I take the position that, as much as possible, decisions should be made and implemented by the people who will have to live with the consequences of them" (Legislative Assembly of Alberta, 1983, p. 606).

As King guided the Department 's estimates through the Committee of Supply in 1982, he reiterated his definition of equity, with a different nuance:

> The idea of equity of opportunity for every child in the province, whether they live in Edmonton or the smallest community, whether they attend a large of small school. We have already demonstrated our commitment to the idea of equity by establishing certain programs that have been very, very helpful: the small jurisdiction grant, the small schools grant, the declining enrolment grant, and the supplementary equalization fund. (Legislative Assembly of Alberta, 1982, p. 445)

During the 1984 spring sitting of the Legislature, King restated his belief in and definition of equal educational opportunity:

> I want a system that treats each child as a person deserving individual attention, respect, and responsibility. I want a tolerance in our schools and in our community that is based on understanding and respecting differences, not on homogenizing our children. I want a school system that is by example always positive and always affirming the best in each child. I want a system that is open, accessible, and welcoming not only of students but of their parents. (Legislative Assembly of Alberta, 1984, p. 471)

The next Minister of Education, Nancy Betkowski, commented to the Committee of Supply when her Department's budget was up for consideration:

> Education is fundamental to every Albertan, but it is especially fundamental to our young people. We have to ensure that they have the capacity and the ability to embrace and shape the future. . . . It is clearly a priority on ensuring that the education system provides students with high-quality education and prepares them for the challenges they will face in the future. (Legislative Assembly of Alberta, 1988, p. 604)

Jim Dinning, newly appointed Minister of Education in 1989, held a similar sentiment to Betkowski's when in his opening comments to the Department he said, "In this government's view and in this Minister's view there is no greater responsibility a society has than to educate its young citizens" (Legislative Assembly of Alberta, 1989, p. 1001). He then quoted from a March 1988 social policy statement that identified "social and economic development [as] inseparable" (p. 1001). All Albertans should be able to "participate democratically and share fully in equal terms on equal terms in the rich cultural, economic, and social diversity of their province and in its future economic development" (p. 1001).

During Halvar Jonson's tenure as Minister of Education, because of the restructuring of education, Heather Forsyth, PC MLA, expressed her constituents' opinion that there was a return to providing only a basic education. Her question to Jonson was, "What is the definition of a basic education?" (Legislative Assembly of Alberta, 1994, p. 974). He replied that there were two important components: (a) a core of essential skills found in the core subjects, and (b) other learning expectations found in the fine arts, physical education, and technology. The "package is very much a part of the modern concept into the future of a basic education" (p. 974).

Jonson opened debate on the 1995-1996 main estimates on March 15, 1995, for the Department: "The past year has seen significant change and enhancement to education in our province, and this is reflected in our budget estimates" (Legislative Assembly of Alberta, 1995, p. 613). Jonson reviewed the five principles that were the basis for the changes that were made and the three-year plan that formed the foundation of the budget debate:

> One, all Alberta students must have equal access to quality education;
> Two, we are to have a fair system of funding all school boards in this province;
> Third, our education resources are focused on students and classrooms;

> Fourth, we have school-based decision making on the expenditure of education dollars; Fifth, there will be greater opportunity for meaningful involvement of parents and the community in local education decisions, and education costs will be reduced to meet our spending target as part of the province's overall deficit elimination plan. (p. 613)

Gary Mar, the Minister of Education following Jonson, was proud to point out that the Department's system was based on "a simple philosophy of equity. Every student in the province should and must have equitable access to the same quality of education" (Legislative Assembly of Alberta, 1997, p. A15).

On November 24, 1998, Nancy Betkowski, Leader of the Official Opposition, read some of the comments of the superintendents of school jurisdictions in which they described the Alberta school system as chaotic and confusing and implied that the government had "dropped the ball" in public education. Mar responded that reforms had accomplished equitable funding for education for all students as well as a number of benefits such as reducing administrative costs, giving parents more responsibility, and reducing the number of school jurisdictions (Legislative Assembly of Alberta, 1998, p. 2053). Betkowski repeated a similar question in December 1998 and received a response from the Premier similar to Mar's earlier statement. He said that the government had "created a system that provides equity and equality for all students throughout the province" (p. 2216), and he enumerated several improvements: ECS funding restoration, funding for special needs, and attention to early intervention programs, literacy, inner-city schools, and transportation (p. 2216).

Mar's theme of access and equity continued into the spring Legislature session. He announced that one of the government's goals was that "children have access to services they require. This government is fully committed to helping every student achieve his or her full potential" (Legislative Assembly of Alberta, 1999, p. DSS74). In response to the debate on the estimates, Mar asserted, "Equity in funding, regardless of where a student lives [in Alberta] . . . is a laudable goal," and these students experienced a much broader scope of programming in school than their parents had ever experienced (p. DSS84). He believed that Alberta had a good education system, but he wanted to see it improve, whether it be in teaching, programming, achievement, or the education facilities available to students (p. DSS89).

Research

In 1982 King spoke to the Department's Committee of Supply about the ongoing work of the Minister's Task Force on School Finance. He saw that part of the task force's work as "to recommend the means by which we might achieve greater equity throughout the educational system" (Legislative Assembly of Alberta, 1982, p. 421). In October 1983 during question period, with regard to the Minister's Task Force on School Finance's recently completed report, King addressed the committee's recommendation that the proportion of funding that the government granted to local school boards be increased to 85%: "In my view, that would be a completely unacceptable proposition for the government" (Legislative Assembly of Alberta, 1983, p. 1377). To suggest a fixed amount would "intrude on historic understandings of local autonomy." (p. 1377). He concluded that the government would not adopt the position.

King discounted the influence of American research on the Alberta experience in education. His point in answer to a question was that the public education systems in many states were in difficult and desperate circumstances. Fortunately, King announced, there was no evidence that this was the case in Canada (Legislative Assembly of Alberta, 1984, p. 713).

Charter of Rights and Freedoms and Court Decisions

The Carriere court decision. During the 1979 Legislature session handicapped students' access to their local school became an issue because of a recent Alberta court decision. Grant Notley, New Democratic MLA, questioned King in the Legislature about educating handicapped children in light of the court decision that was commonly called the *Carriere case*. Shelley Carriere was a student in the Lamont County School Division whose parents wanted her to be able to attend her home school. After receiving an unsatisfactory answer from the school board, the Carrieres took the case to an Alberta court, which ruled in favour of Shelly Carriere and demanded that she be provided an education in her home school. Notley asked whether the government planned to provide additional funding to school boards so that they could better accommodate handicapped students. Koziak's lengthy response ended:

> Under the School Act, as interpreted by the Supreme Court of Alberta, there is a responsibility on the school boards to accept children. The next question becomes the level of the program necessary for that child, and whether or not the school board should be responsible in any way for care and maintenance which are beyond the provision of educational services. (Legislative Assembly of Alberta, 1978, p. 1484)

A provincial election occurred in the spring of 1979. A new minister, David King, was appointed. On June 21, 1979, in the Legislature, King addressed another question on the Carriere case, this time from Mr. Batiuk, PC MLA. His reply was that the programs had to be improved for those school boards that attempted to integrate handicapped children. However, he conceded that the government had to become involved in developing "alternatives and providing support to the local school board so it can improve the opportunity for education in the local school room" (Legislative Assembly of Alberta, 1979, p. 473).

King also addressed the Carriere case again in the Legislature in the fall of 1979 after he had met with Mrs. Carriere. He made it very clear that the court decision was important and that the government had to make sure that school boards across Alberta were in compliance with the court ruling and "the spirit of the law" (Legislative Assembly of Alberta, 1979, p. 812).

During the 1982 sitting of the Legislature, King said that children are individually unique and that the government wanted to "provide for them a variety of alternatives within the public system" (Legislative Assembly of Alberta, 1982, p. 480).The school board essentially had responsibility for and control of the provisions for students. Further, the school board would make " the decisions about access; it makes the decisions about parental involvement" (p. 480).

Minority language rights. In 1983 three families sought through the courts a declaration of their French language rights under the Canadian Charter of Rights and Freedoms. When asked about this in the Legislature, King replied that a review was underway; however, he said that where numbers of students warranted, the government would provide a French language educational program (Legislative Assembly of Alberta, 1983, p. 1504). The issue remained, and in 1987 Marie Laing, New Democrat Party MLA, asked Betkowski whether all children were ensured an educational program that meets their needs under the Charter of Rights. Betkowski answered that "they have the right of access to an education" (Legislative Assembly of Alberta, 1987, p. 122). She reiterated this a couple of weeks later after a supplementary question from Laing on high school board fees prohibiting access for some students whose parents could not afford to pay. Betkowski replied:

> School boards are not allowed to charge tuition fees in this province. A tuition fee means that the school board is preventing access to a basic education program, and that is not allowed because basic education is a universal system within our province. (p. 502)

The minority language question was not raised again until 1990, when Walter Paszkowski, PC MLA, asked Dinning whether a Supreme Court decision regarding Francophone school boards would increase the number of school boards serving francophone students. Dinning interpreted the decision to mean that where the number of francophone students warranted, the Department would deliver educational services to those students based on a sliding scale that would begin with a few students in this francophone category who required instruction until there were sufficient numbers to warrant establishing a francophone school district (Legislative Assembly of Alberta, 1990, p. 95). The next day Stan Woloshyn, New Democratic Party MLA, pressed Dinning on the same issue and asked Dinning whether he would meet with parents of three rural school jurisdictions to honour their children's rights to a francophone education. Dinning responded that until he and his Department were sure of the full meaning of the Supreme Court decision and had had an opportunity to speak to his caucus, he would not be meeting with any parents on this issue; however, he confirmed that Department officials would meet with six school boards that were involved (p. 115). Francophone education, Dinning said, was "something that we have been working on and made a commitment to in the throne speech" (Legislative Assembly of Alberta, 1991, pp. 733-734).

This subject was raised again in 1999 when the Designated Supply Subcommittee—Education met. Gary Mar, Minister of Education, introduced the Department 's estimates for the 1999/2000 fiscal year. "In order to offset the possible loss of federal government funding for Francophone education, an additional $2 million was announced for Alberta Francophone programs" (Legislative Assembly of Alberta, 1999, p. DSS74). This would provide appropriate levels of funding for these programs, according to Mar.

This subject is also raised under the section on the School Act later in this chapter.

Separate school jurisdiction equity and funding. In discussing the MACOSF in 1981 (Legislative Assembly of Alberta, 1981), King addressed the inequities between public and separate school boards and reported that the flow of funds was comparable between them. However, he estimated that

> in many cases the flow of funds from the province is greater to the separate school board in an area than to the public school board, the reason being that we have compensatory funding programs, such as the Supplementary Requisition Equalization Grant, which are more available to separate than public school boards. (p. 512)

The following year King announced that it was the policy of his government "to push as hard as we can to achieve that equity [between separate and public school boards but not to the extent that it breaches] . . . the provisions of the constitution, the Alberta Act, or the British North America Act" (Legislative Assembly of Alberta, 1982, p. 446). However, he wanted to address the policy of government to provide "completely equitable treatment of public and separate school boards operating in the same community" (p. 483). In his evaluation, although there had been a number of improvements in this area, which he did not list, there were some constraints to fully achieving this policy:

> [Although the] private homeowner must make a declaration that his taxes will support the separate school system, . . . it is obviously impossible [for public corporations] to make a declaration on the basis of religion of the owners of the corporation. . . . So the law of the province provides that the assessment against real property owned by publicly traded corporations is divided in the jurisdiction on a per pupil basis. (p. 479)

Betkowski, in answer to a question in the Legislature, said that constitutional rights for a minority faith in a school jurisdiction to form a separate school district had to be honoured, as declared in the School Act, and combining or denying minority faith rights to achieve efficient economies was not an acceptable alternative (Legislative Assembly of Alberta, 1988, p. 822).

Although the government provided equal funding to both separate and public school jurisdictions, Betkowski accepted that the ability of school boards to supplement those funds varied and created inequities; however, the issue of inequity was not restricted to separate school boards, but included some public school boards as well. This issue was one of the reasons that the government had circulated for public discussion its paper on funding education. She assured the Legislature that this topic would be discussed further when the bill on the new School Act was tabled (Legislative Assembly of Alberta, 1988, pp. 829-830).

Later, in the debate on the new School Act in 1988, Betkowski observed that the principle of equity "relates directly to the principle of access, because by equity we mean not just financial equity but, more important, education program equity" (Legislative Assembly of Alberta, 1988, p. 1666) because financial equity was only a means to achieve program equity for students. As an example of equity, she cited "the provision that allows the undeclared residential property to be split between the public and separate boards on the basis of the number of students." (p. 1666). With the introduction of the proposed new School Act, Betkowski said that equity would take effect. She added:

> There's a provisional section which leaves the existing declarations where they are. When there is a no indication of which board the taxes should go to on a new property, is it not fair and equitable for both boards to share in those resources in proportion to their students? (p. 1666)

Jonson spoke during the second reading of Bill 27 and joined Betkowski in support of this concept. He believed that it "should serve the province well long into the future" (Legislative Assembly of Alberta, 1988, p. 1684). Bill 27 passed second reading on June 28, 1988.

The subject of separate school inequities arose again in 1994 after the government announced that it would collect all property taxes to support education. Michael Henry, Liberal MLA, asked Jonson to explain how Catholic separate school supporters would control their own education system when the government intended to collect all of the taxes, set budget levels, and hire superintendents. Jonson replied:

> The very fundamental issue of equitable funding in education is something that Catholic school boards across the province have lobbied for. . . . The initiatives that we've announced in funding can be documented as benefiting 83 percent of Catholic school boards in this province. (Legislative Assembly of Alberta, 1994, p. 7)

Henry asked Jonson whether the Catholic separate systems could trust him when it came to school-district amalgamation. Jonson responded that the government would take the firm position that Catholic school systems would be amalgamated only with other Catholic school systems (p. 8). Later in the session Decore, Leader of the Official Opposition, asked Premier Klein whether he planned to rush the revisions to the School Act to meet the tax rolls by June 1, 1994, which would affect Catholic school jurisdictions despite their challenges in the courts. Klein explained, "Our plan is to restructure the fundamental administration of education in this province to achieve efficiencies, to achieve cost savings, to get more dollars into the classroom, to create fiscal equity, and to balance our budget" (p. 1028).

The autonomy of Catholic school jurisdictions to tax came into question, and they proceeded with court challenges against the government. This led Henry to ask whether a decision had been made to give the Catholic school boards the autonomy to tax. Jonson replied that the government did not want to prejudice "the opportunity for Catholic separate school systems in this province to have fair and equitable funding, and we are respecting their constitutional rights" (Legislative Assembly of Alberta, 1994, p. 1055). He emphasized that "what should be important . . . is equal support for every student in this province" (p. 1055). Henry continued with a supplementary question about "why . . . just . . . six years ago, [the government] gave Catholics the right to undeclared taxes and are now going to pull it away if they want to run their own school system" (p. 1055). Jonson replied, "The Catholic separate system of this province will be able to not only access the amount of money that they were able to obtain before but more through the whole concept of corporate pooling" (p. 1055). In a related question posed by Decore, Premier Klein said, "We've got to make sure that our program of creating fiscal equity is not something that can be amended just for the sake of the Catholic school jurisdictions" (p. 1091). Would the amendments that were being proposed for the School Act violate the constitutional rights of Catholics? asked Jon Havelock, PC MLA. The response was an unequivocal "No" from Jonson, who went on to say that "Catholic school boards will continue to have the right to tax if they so choose. However, those boards will have the option to join the tax redistribution plan and the Alberta school foundation fund" (p. 1092). After a supplementary question from Havelock, Jonson said:

> In 1971 nonresidential and in 1988 residential undeclared taxes began to be apportioned between public and separate school boards. . . . Current provisions for the sharing of the undeclared residential and nonresidential taxes are legislated provisions and not constitutional entitlements. Undeclared properties were traditionally public school properties. Providing moneys in the fashion that was provided for these changes was in addition to the constitutional provisions for the Catholic school boards. In essence, public school taxes have been used to fund the Catholic school system. In doing so, the province was not expanding the rights of Catholic school boards, just providing additional dollars. It is important to emphasize here that the introduction of the Alberta School Foundation Fund [ASFF] will provide fair and equitable funding to all students. (p. 1093)

Henry pursued this topic in question period and wondered whether there really had been any substantive changes to the rights of Catholic school boards and implied that the government was offering only rhetoric on this issue. Jonson said that Bill 19, an amendment to the School Act, was designed to provide a fair and equitable system across the province. With respect to Catholic separate school systems, Jonson opined that it would provide "an enhanced equity position and improved equity position as far as the funding of education is concerned" (p. 1227).

Betty Hewes, Liberal MLA, also raised a related question with Premier Klein. She asked him whether the deputy minister's deadline for Catholic school jurisdictions to opt out of the ASFF would be countermanded because it was premature for Catholic school jurisdictions to decide because of the court challenge. The Premier responded, "The Liberals . . . seem to be vehemently opposed to all kids being given the opportunity to an equal education in this province. That's all we're trying to do, is to create fiscal equity so that all kids in this province can be treated the same" (Legislative Assembly of Alberta, 1994, p. 1269). When Jocelyn Burgener, PC MLA, asked how Catholic school jurisdictions' opting out of the ASFF could be seen as providing equity for students, Jonson replied that funding provided for equitable educational opportunities. However, if a Catholic school district opted out of the ASFF, then it was up to the district to look to its tax base for funds to provide equitable opportunities locally (p. 1374). Later, Premier Klein, in responding to a similar question from Decore, said, "We want to create fiscal equity, we want to protect the constitutional right of Catholics, and we want to meet our financial targets" (p. 1445). Questions of a similar nature to those on the above issues surrounding the rights of Catholic school jurisdictions continued to receive similar answers in the Session (pp. 1550, 1917, 1939, 2047, 2272).

Although the debate had not concluded on Bill 19 and the opt-out provisions for Catholic school jurisdictions was still being debated, Decore challenged Jonson during question period to provide the same options to public school jurisdictions as he had to Catholics. Jonson replied that the provisions in Bill 19 offered no advantage to those Catholic school jurisdictions that had opted out. Therefore, every school board was dealt with fairly and equitably (Legislative Assembly of Alberta, 1994, pp. 1987, 2273).

Pearl Calahasen, PC MLA, asked why Catholic separate school jurisdictions had to opt into the ASFF when the School Act as amended seemed to indicate that they were entitled to equal opportunity. Jonson replied that

> our overall funding plan for education . . . is to provide equal opportunity for all students in this province, be they going to public schools or separate schools. This is what we want to ensure: that there is equitable funding, that every student has equal opportunity for an education as possible, as practical in this province. (Legislative Assembly of Alberta, 1994, p. 1273)

In answering a question from Grant Mitchell, Leader of the Official Opposition, on whether all ratepayers could direct their property taxes to either the public or separate school system, Jonson said that the ASFF would collect taxes from declared supporters (Legislative Assembly of Alberta, 1995, p. 812). Mitchell asked the question again two weeks later and received a similar reply from Jonson, who made an additional instructional point that this was a constitutional right and contained in the Northwest Ordinances. Further, this was the first time that Catholic school systems had been "accorded full and equal funding with the public school systems of [Alberta]" (p. 1683).

Frank Bruseker, Liberal MLA, asked a question on the autonomy of separate school boards to control their own expenditures, and Jonson replied that school boards were on an equitable basis that year. He reiterated that the government had "provided equitable funding to separate and public school boards, . . . something [that the government] had not done before" (Legislative Assembly of Alberta, 1995, p. 1017). Jonson repeated similar answers to similar questions later in the Session (pp. 1122, 1291).

As a result of an Alberta Court of Appeal's decision the previous day on Catholic school boards' being allowed to levy taxes on property, Carol Haley, PC MLA, asked Mar how this decision would affect the powers of local school boards. Mar replied, "The decision is important . . . because it upholds the right of the government to pool education property taxes into the Alberta School Foundation Fund and to redistribute those funds on a fair and equitable basis throughout the province" (Legislative Assembly of Alberta, 1998, p 1287). He went on to say this decision would not threaten the existence of school boards and that the government considered school boards important partners in the delivery of education.

School Act

King raised the issue of the revision of the School Act. While discussing the MFP and small schools, he said:

> Clearly, discussion on the revision of the *School Act* will address question such as size of jurisdictions, and by extension you could address questions such as the optimum size of schools, individual school populations, and the minimum feasible size of school populations. (Legislative Assembly of Alberta, 1985, p. 871)

On June 17, 1987, Betkowski tabled copies of framework highlights for a new School Act in the Legislature for all MLAs. This topic would dominate the discussions on public education for the coming year as well form a part of question period. Upon being questioned by Chumir, Betkowski explained that in 1987 the government wrote a discussion paper on how it might better meet the equity needs that were proposed to be embodied in the new School Act (Legislative Assembly of Alberta, 1988, pp. 51, 187).

During the 1988 Committee of Supply's debate on education, Betkowski underlined that "all students must have access to equitable educational opportunities regardless of where they live" (Legislative Assembly of Alberta, 1988, p. 604). "First and foremost, access to quality education" (p. 606) was a focus for Bill 27, the proposed new School Act, Betkowski announced to the Legislature as she opened debate on second reading of the Bill (p. 1665). In addition, "It's important to say that the ability of school boards to supplement what the province provides, whatever the figure is . . . is where inequity exists. [However], the issue of equity can be met" (p. 1691). She addressed the five key principles in the proposed act, one of which was equity for students: "Children of Alberta will be guaranteed access to the education system and to a program that addresses their unique needs" (p. 2110), she added. Later in the debate, Betkowski pointed to sections 3,5, 29, and 104 of the new School Act that guarantee students the right of access to education for the first time in the history of the province (p. 2110).

The Charter of Rights and Freedoms influenced the writing of Bill 27 because there was a requirement in the proposed legislation to ensure that rights were protected natural justice had been. "Natural justice," Betkowski said, "meant that a decision made by one body should be appealable to a separate and distinct body" (Legislative Assembly of Alberta, 1988, p. 1665).

1992 Bill 41 School Amendment Act. Dinning had introduced Bill 41 in 1992, and it was held over until the fourth session to allow consultation to occur (Legislative Assembly of Alberta, 1992, pp. 2317-2318). The amendments sought included francophone schools, which was an issue that was addressed in this proposed legislation. Section 23 of the Canadian Charter of Rights and Freedoms forced the government to make provision for the establishment of francophone school boards. In a decision on March 15, 1990, concerning the Mahe case, the Supreme Court ruled:

> The province must enact legislation (and regulations, if necessary) that in all respects is consistent with S.23 of the Charter. . . . To date the Legislature of Alberta has failed to discharge its S.33 obligation. It should delay no longer in putting into place the appropriate minority language education scheme. (pp. 2317-2318)

Jonson explained that Bill 41 would address the concerns of the Supreme Court and give parents "the right to access Francophone programs for their children where there are sufficient numbers of students. These programs and schools would be operated by regular school boards" (p. 2318). The bill was passed and became law in 1993.

1994 Bill 19 School Amendment Act. According to Jonson, the amendments proposed in Bill 19 were intended to establish a fair and equitable system of funding for education. The system that was in effect at the time was, in his evaluation, "inequitable both in terms of the tax burden borne by residential and non-residential property owners across the province and with respect to the moneys individual school boards are able to spend to provide provincially mandated education" (Legislative Assembly of Alberta, 1994, p. 1135). Consultation with stakeholders had not achieved consensus on this issue over the previous six years of discussion. Information was gathered from regional meetings on education finance in 1992 and 1993, the roundtable discussions of 1993, and MLA teams going out into Alberta communities. From this information the government decided on full provincial funding, a concept that was included in Bill 19. The most significant change proposed by the bill was to refinance education and redistribute resources to school jurisdictions. In Jonson's evaluation, this would improve student access to education. He emphasized that nothing in the bill violated the Constitution of Canada or the Alberta Act of 1905, and separate schools' rights to tax were protected (p. 1135).

As debate continued in mid May 1994, Jonson restated a theme that he had spoken to on many other occasions in the course of debate: that Bill 19 would provide for "the creation of the Alberta School Foundation Fund (ASFF) . . . into which all taxes raised from the residential and nonresidential tax base will be placed for redistribution to school boards on a per student basis" (Legislative Assembly of Alberta, 1994, p. 1965). The goal was to guarantee that all school boards had equal access to education funding so that students attending a public or separate school, regardless of where they lived in the province, would be funded at the same level. Catholic separate school boards could opt out of the fund and collect their own taxes. Regarding those that opted out, Jonson said that they

> would be able to set their own mill rates, but they would be prohibited from setting mill rates lower than the comparable mill rates set by the [government]. If any separate district raises an amount greater than the amount per student

> generated by the ASFF, the excess will be put into the ASFF consistent with the principle of equal outcome revenue and subject to the 1901 [Northwest Territories School] Ordinance rates. (p. 1965)

When debate on Bill 19 resumed on May 17, 1994, Jonson defined public education in Alberta as "one that is publicly funded; secondly, it is accessible to all students; it is publicly governed by elected people at various levels of the system; and it is a system which functions around a common core curriculum and standards" (Legislative Assembly of Alberta, 1994, p. 2033). The ASFF was designed to enhance this definition and achieve an equal outcome grant or "payment per student in whatever [public or separate] system they are in" (p. 2034).

1995 Bill 37 School Amendment Act. In addition to others, the bill sought changes that were necessary "to fully implement the government's plan for full provincial funding of education and the restructuring and downsizing of school governance and administration" (Legislative Assembly of Alberta, 1995, p. 1536). These measures included dealing with capital funding and the accumulated capital debt of school boards, which were to be fully assumed by the province.

The government specified a "special school tax levy provision—that is, the 3 percent or a local plebiscite provision" (Legislative Assembly of Alberta, 1995, p. 1536)—in the event that a school board wished to seek support from the local ratepayers for a local levy for education. Jonson did not provide any further rational for these measures in his comments to the second reading of the bill. He did add at a later date during the debate on the bill that the purpose of the plebiscite and the application of the funds collected needed to be presented to the ratepayers who voted on it (Legislative Assembly of Alberta, 1995).

As the debate progressed, Jonson informed the Legislature that the funding framework was scheduled to be put into place on September 1, 1995, just three-and-one-half months from the date on which the Assembly was debating it. The funding framework, he reminded the Legislature, "was to provide for equitable funding for all school boards in [Alberta] and, more importantly, . . . for all students in [Alberta]" (Legislative Assembly of Alberta, 1995, p. 1827).

Management and Finance Plan

Autonomy, King emphasized, was something in which he believed. He was the first Minister of Education to make such a statement, but it was tempered with the need for school boards and the Department not to operate independently of each other or to be autonomous from one other, but to interact (Legislative Assembly of Alberta, 1979). He made it clear that school boards could expect the Department to reduce its involvement in the school boards if "local school boards . . . reduced to paper, policies which are fair and equitable in their nature and in their application" (p. 327). This statement was the forerunner to what became the MFP. King added later in 1981, "I do not believe in further centralization of the school system in this province. . . . I am a supporter of decentralization" (Legislative Assembly of Alberta, 1981, p. 512).

The MFP was introduced in 1984, and King addressed it in the Committee of Supply on the Department: "There is the implementation of the new management and finance plan. . . . In a nutshell it enhances local responsibility, discretion, and flexibility, and focuses on objectives, not processes" (Legislative Assembly of Alberta, 1984, p. 469).

In 1985 King reported that because of the MFP, "In two, three, or four years we will be able to show the people of Alberta what is happening in education and we will be able to show them on the basis of the outcome of our educational effort" (Legislative Assembly of Alberta, 1985, p. 541). Trustees, administrators, and teachers supported the MFP:

> because the government will transfer money to school boards with far fewer strings attached in the expectation that, for their part, school boards will develop carefully thought out policies, guidelines, and procedures and then be responsible for the effective use of their resources in the course of operating programs. (p. 543).

When Betkowski took charge of the Department, she said that she was "proud to be part of a new system which focused on the educational needs of the child" (Legislative Assembly of Alberta, 1986, p. 877). With the MFP in place, she believed that the boards' actions were policy driven and provided them with direction, flexibility, and the discretion to better meet the needs of their students.

Roundtable Consultations

In 1993 the Department set up roundtables with the public to discuss the future of public education. Questions arose in the Legislature on the topic of roundtables, discussions that the Department planned to have with the Alberta public. Brassard asked Jonson if it was his intent to hold the roundtables to legitimize the removal of ECS from the education system. Jonson avoided answering the question because he did not have the final report from the roundtables (Legislative Assembly of Alberta, 1993b, p. 1020). When the report was in, there would be "the need to sit down and look at the future directions of educational funding" (p. 1120). These questions and similar answers continued through the session (pp. 1125, 1126). When the report was available Jonson's answers changed. He said that he appreciated the information and that it would be considered in the Department's and government's decisions to achieve its goals (pp. 1189, 1265).

The issue of equity was a dominant theme at the roundtables, according to Jonson. He reported that the Department was actively working on a solution to the problem of equity (Legislative Assembly of Alberta, 1993b, pp. 1045-1046).

Efficiency, Reducing the Deficit, and Local Autonomy

Consolidation of school jurisdictions, it has been argued, brings about improved equal educational opportunity because of the efficiencies gained. However, the government's goal to reduce the deficit and debt may have undermined any improved efficiency that was realized because the funding may not have been adequate. School board local autonomy may also have diminished as these consolidations and efficiencies took place. For these reasons these subjects are summarized in this section of this chapter.

Consolidation of school jurisdictions. Consolidating school jurisdictions was a topic of discussion early in the tenure of the PC government. As Hyndman closed debate on a resolution to a grant in 1974—"a sum not exceeding $311,789,500 . . . for the fiscal year ending March 31, 1975, for the Department of Education" (Legislative Assembly of Alberta, 1974, p. 2986)—he said that he did not "see making any moves towards consolidating school jurisdictions or making them bigger" (p. 2986), even though there were 45 “dummy school jurisdictions” (p. 2986) of the 145 left from the time that Premier Aberhart had consolidated over 500 school jurisdictions down to around 145.

During the intervening years the topic of consolidation, or what became known as regionalization and amalgamation, was discussed; however, it was not until 1993 that this became a topic of serious consideration. In May 1993 the government focused on its deficit and debt. Roy Brassard, PC MLA, on a supplementary question about future budgets in light of reductions, inquired how Jonson intended to accomplish his goal of “the best possible education at a reasonable cost” (Legislative Assembly of Alberta, 1993a, p. 2801). Jonson enumerated three of a number of initiatives: the sharing of services among school jurisdictions, the amalgamation of school jurisdictions to achieve efficiency, and the use of technology.

Jonson sought to amalgamate and regionalize school jurisdictions with their cooperation. He raised this during debate of the estimates in October 1993: “I believe there is a great deal that can be done . . . for the benefit of the education system, but I’m not a subscriber to extra-large [school jurisdictions’] being better” (Legislative Assembly of Alberta, 1993b, p. 974). Judy Gordon, PC MLA, asked Jonson whether he would proceed with incentives or legislation if the voluntary school district amalgamations did not take place. Jonson replied that the amalgamation of 145 school jurisdictions was a “huge priority” and he expected a “cost savings” (p. 990), but he was unwilling to specify the amount of savings that might be realized (p. 990).

By the 1994 spring session the amalgamation of school jurisdictions was in the Department’s plan. Jocelyn Burgener, Liberal MLA, asked Jonson about the process being developed to address the restructuring initiatives (amalgamations) that the Department was undertaking with school jurisdictions. Jonson responded that a number of government MLAs would be involved in task forces to assist him in this task (Legislative Assembly of Alberta, 1994, p. 56). The restructuring would be completed by October 1995 in time for the local school board elections. A couple of weeks later when Oberg asked him about amalgamation, Jonson replied that it would lead to a more efficient transportation system (p. 393).

Efficiency. Efficiency was a topic that Dinning raised and admitted that it made some people uncomfortable. His concern was "the time of spending more money without paying very careful attention to efficiency, paying special attention to results—those days are gone" (Legislative Assembly of Alberta, 1990, p. 583). The proposed budget was 3.5% higher than the previous year's, which was the highest grant increase of all of the government departments. Dinning portrayed this as a generous contribution by Alberta taxpayers; however, he had "told school boards that they will have to manage with that amount, and I've encouraged them to search for ways of being more efficient" (p. 584).

In a subsequent sitting of the Legislature, Decore challenged Jonson about whether he had made a mistake when he said at the outset that education funding would be cut by 20%. Jonson said that the purpose of the workbook used in the roundtables was only to help in the discussions. The decisions about the direction of government had not been made in regard to education or any of the other departments who also were seeking input through the roundtable process (Legislative Assembly of Alberta, 1993b, p. 1151). Thus Decore's question was irrelevant, according to Jonson.

A major theme of the 23rd Legislature was the reduction of the government's budget for the purpose of eliminating the deficit and getting rid of the provincial debt. Questions asked of Jonson often were how this could be accomplished without causing the education system to fail. Mark Hlady, PC MLA, inquired where he saw the individual program cuts being made, and Jonson replied that the Department was taking a leadership position with the need to curb spending. Staffing levels in the Department's offices would be reduced and efficiencies would be sought. He expected the same perspective at the school division level and looked for input from the roundtables for ideas for any other efficiencies (Legislative Assembly of Alberta, 1993b, p. 1152).

On November 2, 1993, in the Legislature, Decore relayed that he understood that the Provincial Treasurer had said that a 20% budget reduction was only a target. He then asked Jonson, if 20% was not the reduction for education, whether he could say what the real cut was. Jonson responded that the target was a balanced provincial budget (Legislative Assembly of Alberta, 1993b, p. 1188). Later in the sitting , a similar question received a similar answer (p. 1228).

Jonson asserted that the focus had to be on coming up with an equitable funding approach for the province. In turn, the Department should look "at a form of independent audit procedure whereby the actual effectiveness and efficiency with which school boards use funds is evaluated" (Legislative Assembly of Alberta, 1993b, p. 1193). Later, Johnson elaborated in reply to another question:

> We need a system which delivers and concentrates our resources at the classroom level, at the student level. We need to cut down on our administration and bureaucracy. We need to provide strong direction on evaluation in programs at the provincial level and level out the education system so that resources can be provided more effectively and flexibly. (p. 1230)

Premier Klein was asked questions in the Legislature about what he was going to do in response to the cuts to teaching staffs in school jurisdictions during the time that they were facing reduced funding. Klein responded that the decisions on staffing were the school jurisdictions' and not the government's (Legislative Assembly of Alberta, 1994, p. 244). Jonson augmented this answer by emphasizing that the direction that the government was taking was to design a business plan that directed resources to the classroom and "to spend money as efficiently as possible" (p. 245). Similar answers were repeated by Jonson in response to similar questions on other occasions (p. 249).

As earlier in the session's question periods, Jonson once again found himself answering queries about teacher layoffs. Oberg asked why school boards were making such announcements in the spring of 1994. Jonson replied that the net reduction in funding for education amounted to between 8% and 9%, down from the original 20%. Despite this reduction, he said, salary packages had been reduced by 5%, and other costs had been reduced, such as administration, thereby reducing costs to school boards. He wanted funding to focus on classrooms. He did not answer the question about the staffing reductions (Legislative Assembly of Alberta, 1994, p. 618).

Decore asked Jonson a similar question two days later and requested an explanation of why, after teachers had taken a 5% cut in salary in Edmonton, the school district was losing hundreds of teachers. Jonson responded, "A clear priority was given to education in terms of it being the least amount that was reduced from any budget over the four-year period at 12.4 percent. It's also important [that] . . . the amount being provided at the local level has not been reduced" (Legislative Assembly of Alberta, 1994, p. 699). He continued, "With the 5 percent reduction, the other plans and directions that we're taking in education with respect to increased efficiencies, the 8.5 percent reduction overall . . . is not unreasonable" (p. 700). These factors, in Jonson's evaluation, should all, "to a large degree, mitigate the need for layoffs" (p. 700). Jonson maintained his position that the budget cuts would be offset by the government's new initiatives to achieve better efficiencies with little effect on the quality of education in the classroom. He reiterated this a month later in the Legislature (p. 1095).

Attaining greater efficiency in delivering education was a recurrent theme that Jonson promoted in addressing the Department's estimates. He encouraged school system administrations to seek the "most cost-effective means of administration and support for the instruction of students" (Legislative Assembly of Alberta, 1995, p. 614).

Local autonomy. Besides efficiency and amalgamation, school boards' maintaining autonomy was of concern. Would locally elected school boards be capable of making decisions locally, Hlady asked, in light of the government's centralization of education funding collection and distribution? School boards, according to Jonson, would certainly continue to make decisions: "There is a breadth of scope there for school boards to make decisions, and we expect that they will make decisions in the best interests of the students they're serving" (Legislative Assembly of Alberta, 1994, p. 774). Later in the session Henry asked about school boards' level of control and decision making relative to the funds that the government provided. Jonson responded that school jurisdictions controlled the funds and had maximum flexibility in the expenditure of those funds through a site-based management system (p. 2326).

Adequate funding. As the government set into place funding reductions for the Department through a funding framework, questions began to arise about the adequacy of funding for education. If it was not adequate, improving the equal educational opportunity (equity) for students might have been in jeopardy. Jonson responded that the funding framework designed by the Department would "ensure a fair and equitable distribution of available education dollars and will ensure that those dollars are focused on classroom instruction" (Legislative Assembly of Alberta, 1995, p. 614) because the province was providing full funding from "all education resources, both from the provincial general revenue fund and local property taxes, and redistributing those resource in a way that is fair to every school board and every student" (p. 614). School boards would experience "more flexibility and more latitude for decision making" (p. 614), which was part of the design of the funding framework.

'New directions' established with a new funding framework would "ensure that students would be well prepared for the world of work and for life long learning at a cost that the province [could] afford" (Legislative Assembly of Alberta, 1995, p. 615), according to Jonson. He concluded, "We will have an education system where all school jurisdictions have access to adequate funding, and all students will have the opportunity for a quality education" (p. 615).

In the next session of the Legislature Massey challenged Mar, the next Minister of Education, on the adequacy of funding for public education. Massey asked Mar whether he was planning to offset the need for local school councils to raise extra funds for an adequate level of funding for their schools. Mar replied that funding from the government was adequate; however, it was the responsibility of the school board to address local school issues if school councils wanted to raise money (Legislative Assembly of Alberta, 1997, p. 199). Four days later, Massey asked a similar question on local school fundraising. Mar reiterated his earlier answer (pp. 228, 259) and added that the government had taken steps to deal with "equity in education, and that's equitable funding throughout the entire province. These situations of inequitable funding did exist in a greater number of cases prior to introducing [this new] system of equitable funding" (p. 228). During the rest of the session similar questions were asked on a number of occasions, and Mar responded similarly that the funding was adequate and equitable (pp. 907, 1004, 1132, 1271, 1309, 1311).

The next year, when Massey questioned Mar about the integrity of the government's reinvestment in education based on an analysis completed by the Calgary Home and School Association, Mar responded with regret that some people would never acknowledge that there was enough money and added that there was a projected $3.4 billion expenditure in education for the 1998-1998 school year. "So for those people," he said, "who level the criticism that there is no new money, that is not correct" (Legislative Assembly of Alberta, 1998, p. 54). Later in the same sitting, Nancy Betkowski, Leader of the Official Opposition, asked whether there was going to be some leadership from the government to allow schools to change their focus from fundraising to learning. Mar, in response, asked the question, "How much is enough?" and then went on to say, "We believe there's an appropriate amount of money being reinvested in education" (p. 2169). He repeated this answer to a similar question from Massey a few days later (p. 2219).

In the 1998-1999 school year the government gave school jurisdictions a grant of $600 million on a per-student basis distributed over three years. Prior to the announcement, Massey said that Mar had indicated that the funding was adequate and wanted to know, "What has happened to warrant such a flip-flop in government policy?" (Legislative Assembly of Alberta, 1999, p. 445). Mar responded to the criticism that Massey should not discount the importance of such an infusion of funding into education. The government needed to control spending at levels that it could afford and sustain. Others raised this question at other times during the session and received similar answers (p. 1604).

Equal Educational Opportunity

Special Education

As the Lougheed PCs began its tenure as a government, it quickly identified the importance that it placed on children with special education needs. During the debate on the Department 's estimates, Hyndman made it clear that it would increase the budget line that dealt with handicapped children and supplying resources to better address their educational needs:

> The $1 million dollars is going to be used to provide a number of programs that we are now looking into, particularly in the area of diagnosis and assessment at an early age of youngsters when they are just starting in the regular school system. (Legislative Assembly of Alberta, 1972, p. 48-99)[7]

Hyndman highlighted the government's priority on "handicapped and disadvantaged children" (Legislative Assembly of Alberta, 1973, p. 32-1539). He added, "Per pupil grants for schools with retarded students [would increase] by 26% , opportunity classes by 50%" (Legislative Assembly of Alberta 1973, p. 32-1539). He added later in the session that parents of handicapped children were advising the Department, and he spoke of "linking together their viewpoints, feelings and choices of parents in the sense that they should have a clear understanding and to be told what the purpose of a certain treatment is" (p. 44-2282). This he believed was an improvement over four years early when "no one knew what a learning disability was" (p. 2282) and the language used was not understandable to the layman. Further, if this area of learning disabilities needed more funding, Hyndman suggested that handicapped students would receive the funding that they needed (p. 44-2288).

Gordon Taylor, a Socred MLA, asked whether the Department was considering placing mentally handicapped children in the "normal" school system, and Hyndman replied that he saw no need to change the existing policy, which allowed these children still to continue to attend the special institutions available to them (Legislative Assembly of Alberta, 1974, p. 438).

Ray Speaker, Socred MLA, asked Koziak, the next Minister of Education, about the education of handicapped children: "Is there consideration being given to mandatory education as of September 1, 1975, to ensure that all handicapped children in Alberta receive educational opportunities?" (Legislative Assembly of Alberta, 1975b, p. 14). Koziak responded that education for handicapped children in most cases can be provided in a special educational facility. When that was not possible "in rare cases" (p. 14) where there was no program or facility, the government's goal, nonetheless, was to provide each handicapped child with an educational opportunity. With this goal in mind, the next year Koziak announced his intention "to spend more time in the area of the handicapped and the assistance we provide to handicapped children" (Legislative Assembly of Alberta, 1976, p. 307). Between 1971 and 1976, he noted, there had been an increase in the services provided for special education. During the 1970-1971 school year 1.18% of all students in the province were receiving special education services, and that increased to 4.11% in the 1975-1976 school year, according to Koziak. This demonstrated the government's priority to provide "special education services for those in need, those who are handicapped, and those who have learning disabilities" (p. 307).

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[7] The page numbers for *Hansard*, Legislative Assembly of Alberta, from 1970 until 1973 were hyphenated; these hyphenated numbers should not be mistaken for a range of pages.

To meet the increasing need for qualified special education teachers, Koziak explained, there had been "substantial growth of special education positions [approximately 60%] . . . providing for additional educational services for children who have handicaps and learning disabilities" (Legislative Assembly of Alberta, 1976, p. 747). He concluded that further teaching positions could be funded if needed.

The government established a learning disabilities fund in 1973, and by 1976 the fund had increased by 50%. It had been $10 per student for assessment purposes and increased to $15 in the 1976-1977 budget year (Legislative Assembly of Alberta, 1976, p. 769).

Along with addressing students with handicaps (special needs), King took an interest in and attempted to promote programs for the gifted. Although he believed the that effort should be left to the local school board (Legislative Assembly of Alberta, 1980), he supported special programming for the gifted by making funds available to school boards that wished to participate. The concern that King had expressed in 1980 continued, and he said during question period in 1983, "Because of that concern, we have established a task force composed of representative citizens of the province" (Legislative Assembly of Alberta, 1983, p. 372). At a later date, during question period King explained, "A number of programs for the gifted and talented children are operating in various school boards in the province" (p. 664). This theme continued into the 1984 Legislature sitting (Legislative Assembly of Alberta, 1984, p. 84).

The opposition asked why special education funding had been changed to block funding. King replied, "We are attempting to re-establish with the school boards in the province a relationship that is based more on their taking responsibility for professional decisions and the implementation of professional decisions within their jurisdiction" (Legislative Assembly of Alberta, 1984, p. 763).

Betkowski clearly supported the delivery of special education programs at the local school level through a block funding program. School boards needed to take care of their own students because, she said, "students cannot be shipped out because they have handicaps" (Legislative Assembly of Alberta, 1986, p. 882). She added later under questioning, "The special education grants would not change" (Legislative Assembly of Alberta, 1987, pp. 15). She made the comment at least 3 more times during this sitting in 1987.

In 1987, while the total budget for education was decreasing by 1.9%, special education grants remained at the same rate as the previous year (Legislative Assembly of Alberta, 1987, pp. 1093-1094).

In the ensuing years the language changed form *handicapped* and *disabled* to include the term *special needs*. During Betkowski's tenure as Minister of Education and the debate on the amendments to the School Act, Sheldon Chumir, Liberal MLA, asked why the government did not provide incentives to school boards to maintain their special education by tying grants to the maintenance of quality. Betkowski responded that she was "very pleased at the change to block funding in 1984 with respect to . . . special education" (Legislative Assembly of Alberta, 1987, p. 1573), because with the block fund school boards would take full responsibility for all students with special needs and provide programs. If the necessary program "does not exist within the home school board, then the board is responsible for providing for the cost of funding a program in another board" (p. 1573).

Liberal MLA Sheldon Chumir's concern over students who went to school hungry prompted him to ask whether the government planned to address the problem. Betkowski replied that it was a problem that society must face and that

> one of the reasons we moved to block funding, for example, is to recognize that different jurisdictions of school boards across the province are dealing with different sets of problems and circumstances, one of which may be the problem of addressing hunger in schools. (Legislative Assembly of Alberta, 1988, p. 232)

She elaborated that school boards were best equipped to decide how revenue from block funds should be spent to meet the needs of children in their jurisdiction (p. 233).

Betty Hewes, Liberal MLA, asked about province-wide access to special-needs education. Betkowski responded, "The [proposed] new School Act [would] guarantee for the first time in Alberta's history right of access of every student in the province to education, including those with special education needs" (Legislative Assembly of Alberta, 1987, p. 1989).

Dinning took over the Ministry from Betkowski in 1989. On May 24, 1991, he focused on handicapped people and the barriers that they might experience "in response to recommendations made by the Premier's Council on the Status of Persons with Disabilities. Accessibility means full and active participation in the life of Alberta" (Legislative Assembly of Alberta, 1991, p. 1394). Although the announcement was broad in its scope and addressed all Albertans with handicaps, he reported that a complete review of special education programs and their funding and coordination would be undertaken (p. 1394). One of the primary considerations was that disabled students would be integrated into the regular classroom (p. 1399).

In the 1990 Legislature session, Diane Mirosh, PC MLA, queried Dinning about his plan to develop programs for handicapped and special-needs students who wanted to be integrated into their home school. Dinning replied that the government was undertaking "a wholesale review of special needs education . . . because of the concern that had come to us that school boards were not able and were concerned that they were not able to fully meet the needs of children with special needs" (Legislative Assembly of Alberta, 1990, p. 73).

Dinning addressed the complete review of special education during the Committee of Supply on Education's discussions on estimates in 1990. He expressed concern for the variety of needs that children had in schools, whether they be special learning needs or the need to address malnutrition, unusual illness, stress, and child abuse. Bringing parents into schools and offering intervention programs for students and inservice support for teachers, he believed, would improve the situation for students (Legislative Assembly of Alberta, 1990, p. 693).

Barry Pashak, New Democrat MLA, asked Dinning whether the he intended to ensure that the special needs of handicapped children were being met in Calgary. Dinning replied that this was the responsibility of the local school board because it had an obligation to educate every child who resided in the district (Legislative Assembly of Alberta, 1992, p. 66). He gave the same response to Woloshyn, who asked a question about enrolling deaf children in mainstream schools (p. 789). Woloshyn inquired about parents having a real choice in where their child was educated and received the same response (p. 1257).

As the next session of the 23rd Legislature began, roundtables had been established and were under way to discuss and recommend changes and improvements for the kindergarten to Grade 12 education system in Alberta. On the first day of the session Laurence Decore, Leader of the Official Opposition, asked Jonson why he had "put programs for disabled children on the chopping block" (Legislative Assembly of Alberta, 1993b, p. 973). Jonson replied that these programs were among the many topics on which he was seeking advice from advisory committees. Once the information came in, he said, decisions would be made about the direction for education.

Jonson informed the Legislature during question period that his Department was considering special projects, and one was a project to address high-needs students in Medicine Hat. Henry asked why these funds were being directed only to Medicine Hat when there were high-needs students throughout the province. Jonson replied that there were block grants that were given to school jurisdictions in the recognition that all school jurisdictions had special-needs students and that "there is a higher average incidence of these students and this need, and therefore we have another grant which concentrates on those high-needs areas" (Legislative Assembly of Alberta, 1994, p. 2717).

In answer to a question from Forsyth about special-needs students, Jonson commented that he hoped that school boards would put special-needs children at or near the top of their priorities for the coming school year. School boards were assigned approximately $8,900 plus the regular amount of funding for high special-needs students and were given some additional flexibility in terms of how they allocated these funds. Mild to moderate funding was rolled into the instructional block, as had been done in the previous year (Legislative Assembly of Alberta, 1995, p. 709).

Henry asked Jonson why the mild and moderate funding for designated children was block-funded, and Jonson responded, as he had done before in a previous session, that the funding amounted to $77 million and was rolled into the instructional fund to give school boards the flexibility that they needed to offer programs for these students (Legislative Assembly of Alberta, 1995, p. 945).

After Mar was appointed Minister of Education, concerns and interest continued to be expressed on special education, particularly with regard to high-needs students because a cap had been put on the number of high-needs students who were funded by the government. Responding to a question from Carol Haley, PC MLA, about the adequacy of funding for students with severe disabilities, Mar said that school jurisdictions were doing a better job of identifying students. Funding arrangements had changed: "Every single student identified as having severe disabilities is now fully funded, and that was not the case before" (Legislative Assembly of Alberta, 1997, p. 56).

Rob Lougheed, PC MLA, asked why the Department was not providing funding for students with mild and moderate disabilities, and Mar reported that the funding framework provided for students in this category, with the funds allocated within the same block as the basic instruction grant had been (Legislative Assembly of Alberta, 1997, p. 588). Of the $3,686 provided for instruction, Mar suggested that about $250 of that covered "mild and moderate disabilities" (p. 588). The Department's experience had been that about 1 in 10 students suffered from mild to moderate learning disabilities. When Lougheed asked if that blocked amount would address the needs of school jurisdictions where the incidence of special-needs students was higher than average, Mar responded that the funding was created with local needs in mind and that school boards had wanted the flexibility to use the funds without any strings attached.

The following year Massey asked Mar about the quota on the number of severely handicapped students who would be funded and what parents of students who were newly identified as severely disabled were to do. Mar replied that there was "a capping of the number of students at the 1997-98 incident rates" (Legislative Assembly of Alberta, 1998, p. 1806).

The funding for mild and moderate special-needs students remained as a block fund rolled into the general instructional grant. This block fund, Mar explained, had increased by 30% from the past year (Legislative Assembly of Alberta, 1998, p. 757).

Early in the third session Gene Zwozdesky, PC MLA, asked Mar how he could "ensure that children are being given special assistance that they need for a fair and even head start in learning" (Legislative Assembly of Alberta, 1999, p. 14), and Mar identified four programs that dealt with children who were socially and economically disadvantaged: (a) an ECS program enhancement project ($2.75 million), (b) an enhanced opportunity program ($3 million), (c) a program unit fund for children aged two and a half to six years (up to $19,000 per eligible student), and (d) an early literacy program ($22 million).

Glen Clegg, PC MLA, asked how school boards could provide programming for severe emotional and behavioural disabilities when limits had been placed on funding. Mar contended that school boards knew what their incidence rates were in 1997-1998, and that would remain the same for three years following; however, the incidence rate has a built-in growth factor that might cause the funding to increase for a particular school jurisdiction (Legislative Assembly of Alberta, 1999, p. 226). Others raised this question at other times during the session (pp. 1527, 1604-1605).

Elementary Education: The Formative Years

Early Childhood Services. Hyndman, in his opening remarks on the Department's budget estimates, spoke to the recommendations of the Worth Report, one of which was to implement a universal and selective experience in early education. Hyndman said that the Department would implement it, in part, through an ECS plan (Legislative Assembly of Alberta, 1973, p. 32-1536). Fennel (1985) wrote in his dissertation that the government had received little public reaction to the Worth Report other than what Hyndman had said. The government caucus, on the other hand, saw the report as "too generalized, too liberal, disparaging the work ethic, lacking an ethical base, and inconsistent with a

Conservative party educational philosophy heavily influenced by the business community" (p. 78).

By 1974 the early childhood services plan was in operation. In a ministerial statement on June 9, 1974, Hyndman announced improvements to the ECS program: (a) The operating grant would be increased by 7%, (b) payments would be made monthly rather than quarterly, (c) forms for new applicants would be simplified, (d) the age ceiling would be removed, (e) ECS teacher upgrading would be facilitated, and (f) increased capital grants would be available for renovation, furniture, and equipment. These were measures that Hyndman said were being taken to "further upgrade the quality of existing early childhood programs and [they] will more easily enable new programs to be started" (Legislative Assembly of Alberta, 1974, p. 2920), thereby giving more children the opportunity to attend ECS.

ECS was a banner new program for the PC government. Hyndman described it as unique because it had not only an educational component, but also health and recreation components for the children who attended. This was part of the answer to a question from Charlie Drain, Socred MLA, who asked whether the government intended to make ECS part of the regular school system. Hyndman admitted that there was no plan to do that at that moment "because we feel it is important [that] the development of a child is looked at in all the dimensions that a young person of four, five, or six may have" (Legislative Assembly of Alberta, 1975a, p. 134). He concluded that the government wanted to continue a multidimensional approach to ECS.

Following Hyndman's tenure, Koziak was appointed Minister of Education in 1975. He announced in the Committee of Supply during estimates for the Department that the entry age for ECS students would be one year younger than the entry level for Grade 1 students (Legislative Assembly of Alberta, 1976, p. 745). As a result, the government offered funding sufficient for a one-year program for each child when any operator, including school jurisdictions, offered an ECS program. If the child was handicapped, up to three years of support would be available for an ECS program. A second year of ECS was offered if the parents, in consultation with ECS staff, saw a need because of the emotional or intellectual immaturity of the child (p. 746).

Later during King's time as minister, he heralded ECS programming as a success: "This has been one of the notable accomplishments of this government in the last 13 years. . . . We have remained remarkably faithful to the policy and precepts first laid down for this program in 1972 and 1973" (Legislative Assembly of Alberta, 1984, p. 1446).

ECS programming did not face any significant changes until the government announced that it would reduce the deficit, and because ECS faced a funding reduction, Decore asked the Premier why the government would cut kindergarten in half when thousands of people were protesting the cut. The Premier responded, "Kindergarten has never been part of the school system" (Legislative Assembly of Alberta, 1994, p. 7):

> We will reduce costs by 50 percent and allow parents and volunteers and so on to assist the ECS teachers to find better and more efficient ways of delivering this service, not a compulsory component to education. . . . Everyone is being treated equally. . . . By cutting the funding for ECS by half, we are giving local educational jurisdictions the opportunity to deliver the same service in a more efficient and better way. (p. 7).

Because the ECS funding was being cut in half, Heather Forsyth, PC MLA, asked Jonson if the hours for special-needs ECS students were also being cut. Jonson replied that only the funding (not the hours) was being cut, but by the same percentage as in other grant areas and not by the 50% prescribed for the regular ECS program (Legislative Assembly of Alberta, 1994, p. 136). Later in the session in response to a question that Ken Nicol, Liberal MLA, posed, Jonson said that an enhanced opportunity grant would be available to school jurisdictions to use where there were high numbers of disadvantaged students (p. 462). Decore pressed Jonson about ECS later in the session and about the lack of evidence supporting the government's position that a reduction in hours would not hurt a child's education. Jonson replied that the evidence was inconclusive (p. 770).

Oberg asked a question about user fees for ECS programs that some school divisions had levied. In Brooks, he said, a user fee of $200 was required to supplement the government's funding to increase the program from 200 to 350 hours. Jonson said that the school boards were making their own decisions about the number of hours offered in ECS programs. The funding, according to Jonson, was intended to provide 250 hours of ECS program, which was fair, equitable, and adequate in his evaluation. Jonson answered similar questions and gave similar responses throughout the session (Legislative Assembly of Alberta, 1994, pp. 1555, 1694, 1740, 2100, 2125, 2386, 2763, 2820, 2906).

Once the reductions were established, the funding for ECS began to change. By the 1994-1995 school year the government began to return some of the funding to ECS. Denis Herard, PC MLA, asked Jonson why ECS funding had increased by 43% while the program hours had gone up by only 20%. Jonson replied that the recommendations of the funding framework implementation team had been followed and that he had responded with an increase in funding that would match the full costs of the program at 240 hours. Jonson reminded the Legislature that school boards could still decide to allocate funding from the instructional block to the ECS program and thereby increase the scope of the program even further (Legislative Assembly of Alberta, 1995, p. 51).

The following year ECS hours were set at 400, which led to Forsyth's question about whether Jonson would mandate ECS; Jonson replied that he would not. Further, he said, "A revised program statement which gives some clear objectives and directions for ECS" (Legislative Assembly of Alberta, 1996, p. 383) had been put into place.

Educational Opportunities Fund. In the fall session of the Alberta Legislature, Hyndman made a ministerial announcement on education finance. He announced the establishment of an EOF to "help introduce and improve selected educational services and programs" (Legislative Assembly of Alberta, 1972, p. 67-14). Later in the session Notley posed a question concerning inequities in funding inner-city students. In Hyndman's estimation, the EOF was a step towards helping schools address inequities for their students if school jurisdictions wished to use the fund for this type of initiative (Legislative Assembly of Alberta, 1973, p. 44-2268).

During the next session of the Legislature the EOF was a highlight, in Koziak's opinion, that brought benefits to elementary education four and five times greater than the money invested. The fund was extended for the 1976-1977 year (Legislative Assembly of Alberta, 1976, p. 308) and continued until 1987, when it was phased out.

Koziak described the EOF as compensatory because school boards received funding for programs that they established because of circumstances that they were facing. He gave the example of language programs to address deficiencies that students experienced that required extra assistance from the school board. This extra effort of a school board could be compensated for by the government if it qualified under the EOF, Koziak said (Legislative Assembly of Alberta, 1976, p. 751).

The EOF was given a further four years in its mandate (Legislative Assembly of Alberta, 1981). This successful program was planned for only a limited time because King expected that it would become part of regular school division operations by 1984 and would not require further specific funding. In the next session of the Legislature, during question period King maintained, "The Educational Opportunity Fund provides a sum of money to which every board in the province has access when they present proposals for learning initiatives, which become funded if approved by the Department of Education" (Legislative Assembly of Alberta, 1982, p. 289). The fund's purpose was to "provide financial support to school boards so that they can experiment with new ways of doing things" (p. 289). The term for the funding was three years, at which time it was to be withdrawn unless there was a resubmission that was acceptable to the Department.

EOF funding was broadened to include opportunity funds for junior high programs. King noted that there was a regular EOF program and a compensatory program to be added at the junior high school level (Legislative Assembly of Alberta, 1984, p. 765).

In 1987 the total budget for education was decreased by 1.9%, and the EOF was eliminated; however, the $5 million from that fund was transferred to a new Native education project (Legislative Assembly of Alberta, 1987, pp. 1093-1094).

Elementary funding increase. Clark asked Hyndman about the different factors in funding between elementary, junior high, and high school classes. At the time the ratio was 1.0, 1.2, and 1.8, respectively. Hyndman replied that the government would be looking at this the following budget year and that "we'll be looking at . . . an increase in the proportion of assistance for elementary education" (Legislative Assembly of Alberta, 1972).

Elementary education was the budget's emphasis in 1976. The weighting factor for funding elementary school would be 1.0, compared to 1.1 for junior high school and 1.5 for high school. Previously, the factors had been 1.0, 1.2, and 1.8, respectively. These factors, Koziak predicted, would be further reduced over the following three years to a point at which they would be 1.0 for elementary, 1.05 for junior high, and 1.2 for high school (Legislative Assembly of Alberta, 1976, p. 307).

Delivery of Services

In answer to a question from Woloshyn about expanding the Head Start program, Dinning explained that he was working with the Minister of Family and Social Services to "come to grips with how we could assist boards throughout [Alberta] to expand their existing Head Start program to make sure it's available to more students" (Legislative Assembly of Alberta, 1991, p. 268). Even with the plan to assist boards, Dinning called upon the school boards, other agencies, and parents to assist him with "ensuring that children came to school ready to learn" (p. 268).

Teacher Certification and Qualifications

Until the late 1960s the required qualifications of teachers varied throughout the province. The large cities tended to have more teachers with bachelor's degrees than did the rural areas. Hyndman drew attention to his concern with teacher education and training. As a result, in Hyndman's estimation, the quality of education for students would improve with the new requirement that teachers have four years of postsecondary education before they can be considered for certification (Legislative Assembly of Alberta, 1973, p. 32-1539).

The statistics that Betkowski shared with the Legislature showed that teachers were better educated. Ninety-five percent of teachers had at least one degree compared to an average of 80% across Canada (Legislative Assembly of Alberta, 1986, p. 877).

Thirteen years later Betkowski, now the Leader of the Official Opposition, questioned Mar on a policy that his Department was pushing to encourage school boards to drop their most experienced teachers when these were people who were key to improving student achievement. Mar responded that there needed to be a balance of new and experienced teachers. Further, he added that school boards needed to have "a balanced human resource strategy and recognize that that is the demographics they'd have to deal with" (Legislative Assembly of Alberta, 1999, p. 341). Others raised this issue in the Legislature at later dates and received a similar answer (pp. 678, 708, 744, 1159).

Distance Learning and Technology

In the early 1970s, Minister of Education Bob Clark addressed the technology of television. He had said that this technology was significant in delivering an adequate and common level of instruction across the province; however, television had not had a significant impact on equity. In the fall session of the Alberta Legislature, Hyndman made a ministerial announcement on education finance. He concluded it by saying that education was labour intensive and that staffing costs were rising faster than other costs. One possibility to solve this problem, he said, "might be the introduction of new ways of delivering education to students. Here I am thinking about the greater use of media technology, much as that proposed for the Alberta Academy in the Worth Report" (Legislative Assembly of Alberta, 1972, p. 67-14).

In 1980 King prophesied that "change is going to occur in education arising from three characteristic trends. . . . Demographics, technology, and social attitudes are all imposing change on the system that we must be prepared to respond to" (Legislative Assembly of Alberta, 1980, p. 326). Computers were the new technology that King was about to introduce in his term as minister. Into the late 1980s, after he left office, this technology was used to address inequities in student program availability through distance learning. It was believed that computers were a significant part of distance learning's ability to deliver similar programming to students in small schools and those in special circumstances who could not easily access a local school.

Technology remained a topic of interest and discussion. The budget estimate that Dinning introduced in 1989 was for $1.387 billion, with an additional $162.8 million from the levy on commercial and industrial property, for a total of $1.55 billion. He stressed, "Our goal isn't just to improve equity for school boards; it is to improve equity for students" (Legislative Assembly of Alberta, 1989, p. 1012). A major thrust in accomplishing this was the attention to distance learning, with its budget line increased by $11 million. Dinning applauded the success of the distance education program. Sixty-five school jurisdictions had taken up the offer and installed the hardware in their schools to deliver this program (Legislative Assembly of Alberta, 1990, p. 693).

The next Minister, Halvar Jonson, on being questioned by Henry about the reduction to school jurisdictions' budgets, said that distance education, although facing the same reduction as others areas in education, would be a priority for the government because it was a very cost-effective way to deliver education to some parts of the province. However, he admitted that technology would not be ideal for all students, but should be available to all of them as an option (Legislative Assembly of Alberta, 1994, p. 578).

Native Education

Education North was a program in which the government's goal was to work with Native people in northern Alberta on a curriculum that "was more suitable for the needs of native and northern students" (Legislative Assembly of Alberta, 1978, p. 831). Koziak hoped that this would help northern communities to recognize the school as a place that belonged to them. King continued the project.

Eliminating equal opportunity funding programs in the 1987 budget "helped inner-city and low-income schools" (Legislative Assembly of Alberta, 1988, p. 1209), and Sheldon Chumir, Liberal MLA, questioned Betkowski about it. She replied that these funds had been reduced but that some funds had been budgeted for special learning opportunities; in particular, Native education projects. These funds had been retained and increased by 2%.

The budget line in 1991 for education for which Dinning was seeking approval from the Legislative Assembly was $1.743 billion. Within this budget, Dinning announced funding for Native education to develop and preserve Native languages in Alberta schools (Legislative Assembly of Alberta, 1991, pp. 733-734). Later in the session Henry asked him about Aboriginal children, and Dinning replied that the government had rolled the Native education grant and others such as the secondary implementation grant into a block for educational purposes "because we want to see all the possible money focused on the instruction of students (Legislative Assembly of Alberta, 1995, p. 1339).

Language Programs

Bilingual programs of instruction received $65 per participating student, according to an announcement made by Koziak on April 16, 1977:

> Where such a bilingual program has been requested by a responsible association of parents and supported by a school board, instruction in an additional language may be provided to the end of grade 6 for up to 50 percent of the school day. (Legislative Assembly of Alberta, 1977, p. 691)

An additional $15,000 for teacher bursaries was made available for the following six years, and grants for transportation allowed school boards to transport children to schools with bilingual programs (pp. 691-692).

Fiscal Equity

Policy, Definitions, and Beliefs

In 1983 King affirmed that he believed in general terms that "Alberta's educational finance plan is probably the best in North America. There is always room for improvement" (Legislative Assembly of Alberta, 1983, p. 648). The educational finance plan, he added,

> is not exclusively pupil driven, It doesn't respond to enrolment alone, to nothing but enrolment. On the other hand, it is not exclusively program driven, and it is not exclusively equity driven. But in different parts of the plan, the total plan is driven by all three consideration; enrolment, program, and equity. (p. 648)

This, in contrast with the SFPF, he did not see as equity driven; rather, the "per pupil/per annum grant is obviously enrolment driven" (p. 649). The educational grant programs initiated by the government since 1975 included the

> small jurisdiction grant, the private school opening grant, the corporate assessment grant, the learning exchange program, the interdepartmental community schools program, the official language grant, English as a second language program, special education program unit grants, sensory multi-

> handicapped program, small centre assistance grant, and native urban compensatory program. (p. 654)

In describing the fundamentals of the educational finance system to the Committee of Supply, King explained that the government's financial assistance was based on a school board's enrolment, offering of programs, and available local resources: "We do fund unequally in order to support equity. We believe we should continue to fund unequally in order to support the concept of equity" (Legislative Assembly of Alberta, 1984, p. 704).

In 1990 Laurence Decore, Leader of the Official Opposition, asked Dinning whether he found it "proper to spend as much on servicing the debt as we are on looking after and training and educating young people in [Alberta]" (Legislative Assembly of Alberta, 1990, p. 535). Dinning responded that, as a reflection of what the government was hearing from Albertans, its priorities were, first, "to maintain the best quality health and education services for the people in [Alberta], second, . . . to reduce the deficit, balance [the] budget, and get [the province's] financial house in order" (p. 535). He assured the Legislature that that was what the government was doing. Obviously, Decore had been referring to the province's debt, an issue that later drew the attention of both the PCs and the Liberals.

Because there was an election in June 1993, the estimates for all government departments were debated in the fall sitting of the Legislature. During the debate on the 1993-1994 estimates for the Department, Jonson, who had just taken over the ministry from Dinning, reminded the Legislature that "a decision was made in 1974, a time when the revenue was rolling into the province, . . . to take the school foundation program levy off residential and farm property" (Legislative Assembly of Alberta, 1993b, p. 973). He pointed out that that left taxation room for other "property tax gatherers" (p. 973). Further, the government's proportion of the funding for education had risen, and the local taxpayer's portion had gone down. "Never in recent history had the province provided that [high a] proportion out of general revenue" (p. 973). Since the 1988-1989 budget, Jonson remarked, there had been no cuts to education; rather, there had been increases slightly in excess of inflation. There was "a major challenge facing government in terms of balancing the budget, and decisions are decisions ultimately of the overall government" (p. 973).

Urban and rural funding. In 1999 Ron Stevens, PC MLA, relayed his constituents' concerns about apparent inequities in the educational system in which rural areas received more funding per student than Calgary did. Mar assured the Legislature:

> Calgary students are funded the same as students from other boards in other parts of the province. Every school board . . . receives an equal per student amount for basic instruction and then additional funding on a per student basis to meet the special needs of their students. (Legislative Assembly of Alberta, 1999, p. 227)

School Foundation Program Fund

In the fall session of the Alberta Legislature, Hyndman made a ministerial announcement on education finance. First, he reported that in 1973 and the two subsequent years the SFPF would increase by up to 7.5%, and increases in 1974 and 1975 would be related to fluctuations in the gross provincial product. (Legislative Assembly of Alberta, 1972, p. 67-14). Six years later the budget for the Department was $603,160,905, with additional revenue of $78 million from the SFPF levy on commercial and industrial property. This was an 8.8% increase over the previous year (Legislative Assembly of Alberta, 1978, p. 830).

When King addressed the Committee of Supply in 1981, he stated the government's policy regarding the importance of fiscal equity in education:

> It is a simple statement of the policy of the government that we fund unequally in order to assure equity. We have a variety of different financial programs, some of which are pupil driven, some of which are program driven, and some which depend upon a measure of wealth in the local jurisdiction. By the mixture of all those, we provide a different level of support to different jurisdictions depending upon the need of those jurisdictions. (Legislative Assembly of Alberta, 1981, (p. 511)

Further, he referred to the Minister's Task Force on School Finance, which was reviewing school financing at the time. This review began in 1979 and concluded in 1983. King believed that "with the passage of time [there were some] demonstrated weaknesses in the SFPF introduced by the Socred government in 1961" (Legislative

Assembly of Alberta, 1981, p. 512). Although King praised the Socred government's introduction of the SFPF, he concluded that "even in a program which was a leader in its day, it is precisely because of the recognitions of problems that we are engaged in this major review at this time" (p. 512). In his address King questioned what a basic education was and whether it was the same in every school jurisdiction in the province. He was hoping that the Minister's Task Force would be able to answer these questions.

In 1989 the budget estimates that Dinning introduced were for $1.387 billion, with an additional $162.8 million from the levy on commercial and industrial property, for a total of $1.55 billion. The SFPF increased by 5.7% and fiscal equity grants by 13.3%. He avowed, "Our goal isn't just to improve equity for school boards; it is to improve equity for students" (Legislative Assembly of Alberta, 1989, p. 1012). A major thrust to accomplish this was to increase the budget line for distance learning by $11 million. For schools with high needs, such as for English-as-a-second-language programs or students' coming to school hungry, Dinning announced an additional $1.7 million.

Dinning advised, as King had when he was minister, "We have to . . . sit down and [ask] what constitutes a basic education which we as a government must fund" (Legislative Assembly of Alberta, 1989, p. 1026).

By 1991 the budget line for education for which Dinning sought approval from the Legislative Assembly was $1.743 billion. Almost $200 million of that would come from the SFPF levy on commercial and industrial property (Legislative Assembly of Alberta, 1991, pp. 733-734).

In 1994 Jonson declared, "The general requisition power of school boards has been appealed" (Legislative Assembly of Alberta, 1994, p. 1136). The province planned to "phase in uniform mill rates for residential and farm land and a uniform mill rate for non-residential properties throughout the province" (p. 1136). The ASFF was to replace the SFPF and would serve as a trust fund for the money collected through a levy on uniform mill rates to ensure that it would be used for education in public and separate school jurisdictions. "The most significant change," according to Jonson, "is the removal of the general requisition power [of school jurisdictions]. Instead, school boards will be fully funded through the ASFF and general revenue fund for both operating and capital" (p. 1136).

Classroom unit (CRU) and per-pupil funding. Grant Notley, New Democratic Party MLA, questioned Hyndman during the 1972 estimates: "Are you considering any change to the CRU formula so that the disparity that one senses exist can be ironed out?" (Legislative Assembly of Alberta, 1972, p. 48-100) Hyndman acknowledged that there

> certainly are inequities which can result in small school jurisdictions by reason of that educators referred to as the 'truncation problem.' . . . In looking to next year, the whole method of distributing grants to schools is wide open. . . . Certainly one of the aims will be to ensure that the small rural Catholic school districts which do face a very real problem and do get some assistance by the small jurisdiction allowance this year, totalling $400,000 that that inequity can be either removed or reduced from what it is now. (p. 48-100)

In the fall session of the Alberta Legislature, Hyndman made a ministerial announcement on education finance that instructional grants were to be made on a per-pupil basis rather than using the old formula based on the CRU. He hoped that per-pupil funding would resolve the inequities that some small school jurisdictions had experienced under the old formula because of class sizes of fewer than 13 students, the cut-off for CRU funding (Legislative Assembly of Alberta, 1972, p. 67-14).

Provincial Revenue and Funding Levels

Hyndman announced in 1973, "Through the educational tax refund plan, some $52 million new from resource revenues going to the people of Alberta will provide for tax relief on the 30 mill equalized assessment" (Legislative Assembly of Alberta, 1973, p. 32-1536). Fifty percent of the property taxpayer's levy, he estimated, went to education prior to this decision. Ratepayers had not been pleased with this levy in the past, according to Hyndman, and it was a contributing reason for putting provincial revenues into education to offset the property tax burden felt by ratepayers.

When the debate on the estimates continued later in April 1973, Hyndman reiterated what he had stated in the 1972 sitting of the Legislature: that there were special circumstances that created financial problems for individual school boards. "So in the interest of equity and fairness to all, we are prepared to look at those who put up a special case" (Legislative Assembly of Alberta, 1973, p. 44-2272). Under further questioning from MLAs in the House, Hyndman replied:

> It is the opinion of the Department and of myself, it is crucially important to maintain a public, non-sectarian school system because that democratic method which has only developed in the last 150 years is the only guarantee, in the long run, of equal opportunity, although equal opportunity is something which we may never attain. But we always strive for (p. 44-2273)

Hyndman further commented during this budget debate that the government had taken four steps "to ameliorate the problems that caused a differentiation of quality in education in the rural area. We plan two or three more" (p. 44-2289).

In answering a question from Bill Purdy, PC MLA, about changing the guidelines for grants available to school jurisdictions that experienced high growth or declining student population, Hyndman stated that for the coming year there would be no change; however, he was planning an announcement in the 1975 fall sitting of

> a new two or three year finance plan at even greater equity from the point of view of urban and rural jurisdictions to ensure there is the maximum kind of educational opportunity for students, irrespective of where they live or the conditions under which they are taking schooling. (Legislative Assembly of Alberta, 1975a, p. 260)

Just prior to the 1975 general provincial election, Koziak acknowledged that the residents of his constituency, Edmonton Strathcona, had been favourably affected by the government's reduction of property taxes, a measure that had been implemented the year before. Koziak made these comments a month before Premier Lougheed called a provincial election (Legislative Assembly of Alberta, 1975b, p. 27), and he was appointed Minister of Education following the 1975 election.

In 1980 during his address to the Committee of Supply on the Department Estimates, King concluded with his four points of stewardship:

> I believe strongly that what we require now is much more:
> . . . imagination rather than money,
> . . . good faith rather than defensiveness,
> . . . concern for the child rather than concern for the system, [and]

> . . . control over circumstances rather than circumstances exercising their control over us. (Legislative Assembly of Alberta, 1980, p. 327)

Within three years government revenues were down because of a recession, and funding to school boards would not increase. King addressed the Legislative Assembly during the Committee of Supply about the situation and said , "imagination rather than money" was all that was available (Alberta Legislative Assembly 1980, p. 327). He went on but did not mention equity in this statement; however, during his time as minister he addressed the topic of equity a number of times.

The government had begun to feel the results of a "deep and persistent recession" (Legislative Assembly of Alberta, 1983, p. 606) in 1983, according to King in his opening remarks to the Committee of Supply on the Department estimates. Despite this, "Alberta has one of the finest educational systems in the world" (p. 606). The "child is, or should be, the focus of education. . . . It is true that education must serve the interests of the child. It is equally true that education must serve the interests of the community" (p. 606). Two days later he contended, "We are first among all Canadian provinces, with respect to the "per capita and per student investment in education; . . . [and] . . . the supplementary requisition for schools, the local property, is on average the lowest in Canada" (p. 648). There was evidence, in King's view, although he did not elaborate, that the disparity between rural and urban school boards had been progressively reduced since the PC government had come into power in 1971.

Education funding from the province was not increased for 1984 despite an inflation rate in Edmonton of 4.5%. When asked about his evaluation of the impact on school boards, King defended the 0% increase and said that previous funding levels from the government had exceeded the inflation rates of the day (Legislative Assembly of Alberta, 1984, p. 308).

The next Minster of Education, Betkowski, addressed school boards and financial matters by restating the 1986 Throne Speech, in which she said, "Recognition of the financial pressure on our education system will be reflected by a significant increase in funding. The level . . . will exceed inflation and provide financial flexibility to our school boards" (Legislative Assembly of Alberta, 1986, p. 178). However, in this same year the government planned for a decrease in spending on education. Nonetheless, Betkowski's goal was to ensure that government revenue was "spent wisely and on people who need the services the most" (p. 178). Earlier, Nick Taylor, Liberal MLA, had asked Betkowski about the 3% budget cut and its net effect on education in light of the 4% inflation that was occurring. Betkowski responded that she had to leave that up to the local school boards' wisdom and that she was confident that they would do what was right. Further, the equity grant had not been affected, and it was increasing (Legislative Assembly of Alberta, 1987, p. 13).

Thomas Sigurdson, New Democratic MLA, questioned Betkowski about reversing the trend of the government's reduced funding for public education in light of the cuts to the budget. Betkowski responded that that was not the pressing issue; rather, the issue was the uneven distribution of wealth between school jurisdictions (Legislative Assembly of Alberta, 1987, p. 1989).

Betkowski said that she had listened to the advice that she had received from school boards who told her that fiscal equity for boards needed to be preserved because

> some school boards have less fiscal capacity than another. And perhaps the best way to describe that is to think of a large school board like the city of Edmonton public school board, which is funded 60 percent by the province and about 40 percent by local tax base, as compared to another school board, for example, Lac La Biche school board, which is about 85 percent funded by the province and 15 percent by local tax base. We can imagine clearly that it is far more difficult to take minus three off 85 percent of one's budget than it is to take minus three off 60 percent of one's budget. Therefore there is an equity to try and smooth that difficulty and that differing fiscal capacity. (Legislative Assembly of Alberta, 1987, pp. 1093-1094)

The next Minister of Education, Jim Dinning, reported to the Legislature that two important commitments were a continued focus on results and performance in education and a commitment to holding the line on spending increases (Legislative Assembly of Alberta, 1992, p. 483). To make his point, he quoted the Governor of the state of Maine, who said, "By breaking the cycle of funding increases in our schools, we force a change from expensive inputs to learning-oriented outcomes. We have the opportunity to realign our educational efforts to focus on creative solutions to our needs" (p. 483).

During the debate on whether to allow a "motion for return" by Yolande Gagnon, Liberal MLA, on the impact of the GST on school boards, Dinning spoke against such a motion and its implications:

> Is it the responsibility of the insatiable appetite of some school boards for more and more and more and more money? Or is it the responsibility of all of us as duly elected people, including school boards, to live within the taxpayers' means? (Legislative Assembly of Alberta, 1992, p. 1260)

Jonson answered a question from Lyle Oberg, PC MLA, on student transportation and equity and said that there are special cases in the province where, in addition to transportation, there were other areas that needed extra funding (Legislative Assembly of Alberta, 1993b). He continued:

> The fact that there are these rather marked inequities among school jurisdictions in their ability to raise local funds from their local assessments is at the base of school jurisdictions being able to spend in the range of $3,500 to $22,000 per student. (p. 1192)

Grants for Equalization and Equity

Equalization grants. In 1974 Notley pressed Hyndman on the question of increased costs for rural school jurisdictions. Hyndman told the Legislature that the Department would assess the plan for different school boards to receive different levels of support. Trustees would need to demonstrate situations where costs for services, materials, and utilities were greater in one situation than another (Legislative Assembly of Alberta, 1974, p. 3147). Hyndman answered a supplementary question:

> The record shows that since 1971 we have been moving gradually towards a reduction of the restrictions in terms of supplementary requisitions. . . . Who is accountable and who is considered accountable by the people of this province in major matters concerning education? (p. 2985)

The next day Hyndman announced some new school grants that, he said, would provide "significantly greater equity to a large number of Alberta school systems" (Legislative Assembly of Alberta, 1975a, p. 550). School systems with low assessments would benefit as well as those with "disproportionate property assessments" (p. 550).

Regulations would be introduced after it had been explained to school boards and their administrative officers, and they would see a "higher proportional support for school systems with low corporate and residential assessment" (p. 550). Within a few days the 1975 provincial election was called, and Hyndman was returned to office and appointed Provincial Treasurer in the new Cabinet.

Equity grant. Fiscal equity was a concern for Betkowski and the school boards, and the government was providing "an additional $2.1 million, or an increase of 7.8 percent . . . for a general equity grant" (Legislative Assembly of Alberta, 1986, p. 879). The budget for education was $1.297 billion, 5.7% more than in the previous year (p. 877). In 1987 equity grants were increased by $3 million in 1987, where the total budget for education decreased by 1.9% (Legislative Assembly of Alberta, 1987, pp. 1093-1094). After this reduction, the proposed 1988 budget for education was to be increased by 2%, and equity grants were scheduled to increase 6.6% to $56.3 million (Legislative Assembly of Alberta, 1988, p. 604).

Chumir asked about the government's effort to complete the equity grant plans that it had introduced in 1984. Betkowski responded:

> The question of equity and the meeting of equity needs across this province is not restricted to rural areas. In fact, there is an inequity in terms of the manner in which a school board may supplement what the province gives to all students in this province. (Legislative Assembly of Alberta, 1988, pp. 51)

In 1991 Dinning answered a question about equity issues asked by Gagnon. He said that $70 million would go to school jurisdictions that did not have an adequate tax base to fund education to address their needs. As he had in 1990, he listed several options to solve the problem of fiscal equity for the long term (Legislative Assembly of Alberta, 1991, p. 1785). That year Dinning was asking for $83 million for fiscal equity and equity grants to school boards and for the distance learning initiative (pp. 733-734).

Woloshyn questioned Dinning on the government's reduction of the equity grants to some school jurisdictions by up to 65%. Dinning responded that the equity grants amounted to $70 million and that it was only for school jurisdictions that needed it (Legislative Assembly of Alberta, 1992, p. 1501). For a third year in a row the opposition, with Woloshyn leading the questioning, asked Dinning about equity funding. Dinning said that he continued to seek consensus from the school boards, taxpayers, and parents and was concerned that if no solution was found, Alberta's effective educational system might be eroded (p. 1787).

Jonson was appointed minister when the 1993-1994 fiscal year began, and he announced that this would be the best possible time to deal with the issue of fiscal equity. The equity grant also needed to be adjusted to minimize the inequity that was determined based on an assessment per student, the distance from a major centre, and sparsity in a school jurisdiction (Legislative Assembly of Alberta, 1993b, p. 974).

Declining enrolment grants. In a ministerial statement on February 10, 1975, Hyndman announced a declining enrolment grant that would affect 57 school jurisdictions. The purpose of the grant was to "offset increased costs faced by school boards having a declining enrolment which is above average" (Legislative Assembly of Alberta, 1975a, p. 492).

Small school grants. On April 19, 1974, Hyndman made a ministerial statement on the guidelines of Small School Assistance and Preservation Grants. He revealed that a special grant was being made available to help to preserve small and remote rural schools, to maintain the school where it is an important element to the community, to reduce the need for rural centralization, and to provide an alternative to school boards who were looking at long school bus routes to centralize educational services (Legislative Assembly of Alberta, 1974, p. 1222). This was a grant that came into effect the next school year and amounted to a total of $400,000 to $500,000, with the goal of achieving a better level of equal educational opportunity for students.

In 1975 the government had provided over $600,000 to qualifying school jurisdictions in recognition of the higher cost of operating small schools. On March 31, 1977, Koziak announced a revision to the grant that would increase the amount to $1.6 million. Schools with an average enrolment of fewer than 10 students in each class would qualify for $1,500 per school plus an additional $50 per student. Schools with more than 10 but fewer than 20 students would receive a grant that was proportional to the small school grant (Legislative Assembly of Alberta, 1977, pp. 578-579). This grant was the result of recommendations from the MACOSF (1975). To a question from Bob Clark, Socred party MLA, on this topic, Koziak replied:

> What we are doing by this grant is recognizing the fact that school boards now are spending more money to maintain these schools open and hoping that with the assistance of this grant they will be able to continue to do so in the future. (p. 583)

Koziak saw this grant as a reimbursement to school boards who, before this grant was offered, had shouldered the cost of operating small schools. Eight years later King considered small schools the responsibility of local school boards. "It's a decision they are entitled to make" (Legislative Assembly of Alberta, 1985, p. 871).

Colleen Soetaert, Liberal MLA, asked Jonson whether his intention was to drastically underfund education so that small rural communities would see their schools close. Jonson responded, "The grants in the budget for education were not reduced this year but in fact increased modestly" (Legislative Assembly of Alberta, 1996, p. 1470). To a supplementary question from Soetaert, Jonson replied, "Within the funding framework, which brings considerable equity and actual improvement in funding to many rural areas which did not have a significant tax base before, there is the flexibility to provide adequate funding to small schools" (p. 1470).

Mar was questioned by Burgener about the impact of the government's funding on small schools. Mar said that the funding framework determined what each school jurisdiction received. It was then up to the school board to decide how that funding would be distributed according to their priorities and needs (Legislative Assembly of Alberta, 1998, p. 1014).

Sparsity and distance grants. On March 20, 1973, Notley asked Hyndman about the government's financial provisions to deal with sparse populations and the effect on school jurisdictions. Hyndman responded that for the first time a grant structure totalling $2.4 million (up from the previous $400,000) had been developed and would be directed largely to smaller school jurisdictions and the more sparsely populated rural school jurisdictions of Alberta (Legislative Assembly of Alberta, 1973, p. 24-1007). On a further query from Notley on the issue of a drop in student population in a school jurisdiction, Hyndman commented that the Department would "be prepared to sit down and talk with the board and, if those special circumstances were present, to consider such changes as may be necessary" (p. 24-1007). The next day Hyndman told the Legislature that the grant was not a sparsity grant; however, it was available to remote rural school jurisdictions "to help them over problems relating to small schools" (p. 25-117).

School building in areas that were at a distance greater than 50 miles from a major centre would receive an extra $1 per square foot of construction, according to Koziak in 1976. This grant increased on a gradient of $1 per square foot for every increment of 50 miles, to a maximum of $4. Portable classrooms were funded on a similar gradient except that $0.50 per square foot was added (Legislative Assembly of Alberta, 1976, p. 746).

On April 4, 1977, Koziak made another ministerial statement announcing a replacement of the isolation bonuses with a location allowance that included an funding increase. The government began to phase in a location allowance for school jurisdictions that were at a distance from the large urban centres, based on recommendations from a report that Mr. E. G. Wahlstrom released in July 1976 and another report from Dr. Swift on the operation of Northland School Division. The amount for the grant was $300 to $2,750 per teacher, depending on the distance from a major centre as well as the area and size of the school building (Legislative Assembly of Alberta, 1977, p. 621).

Betkowski told the 1986 Committee of Supply on Education Estimates that additional funds were being made available to "jurisdictions experiencing sparsity in student populations and distance from major urban centres" (Legislative Assembly of Alberta, 1986, p. 879). The next Minister, Dinning, reported, "We have done our best through a formula to estimate the incremental costs that relate to sparsity, a sparse distribution of students in a school district, and their distance from a major centre" education (Legislative Assembly of Alberta, 1989, p. 1025). He believed that the fiscal equity formula required fine tuning and questioned whether there was an effective and proper way to fund education.

Oberg was concerned about the possibility of the length of time that students rode the school bus increasing as a result of cuts to school district budgets. He asked Jonson whether this would be considered in any sparsity-related grants. Jonson answered, "The factors of sparsity, in terms of student population, and distance, in terms of the amount of traveling that students have to do on school buses, will certainly be considered in that formula" (Legislative Assembly of Alberta, 1994, p. 392).

In response to a question from Paul Langevin, Liberal MLA, about keeping small schools open, Jonson said that the government's funding formula considered the factors of sparsity and distance. These factors would address the concerns expressed by Langevin, according to Jonson (Legislative Assembly of Alberta, 1994, p. 1156).

When Oberg asked Jonson whether he intended to amend the sparsity and distance grant, Jonson replied that the Department would continue to monitor the funding of school jurisdictions and fine-tune the formulas. He also said, "Our current sparsity and distance formula treats [school jurisdictions] quite fairly" (Legislative Assembly of Alberta, 1996, p. 380), but he was prepared to review them in the future.

After Mar was appointed minister, Denis Herard, PC MLA, asked him to explain how sparsity and distance grants were earned by school jurisdictions and why these grants might be seen as disadvantaging urban boards. Mar replied that there were higher costs associated with operating schools in sparsely populated areas:

> Sparsity takes into account the number of square miles and the number of rural students that would be in that area, and distance funding would take into account the distance that school jurisdictions are from a major urban centre and also the distance that individual schools are from their jurisdiction office. (Legislative Assembly of Alberta, 1997, pp. 1080-1081)

During the 1997 education estimates, Gary Mar explained that the $8 million reinvestment of equity funding announced on June 24, 1996, would address the issue of the higher costs of delivering education in sparsely populated areas by helping to meet the increasing costs of transportation, operations and maintenance, and sparsity and distance (p. A15).

Supplementary Requisition Grant

A question raised by the Official Leader of the Opposition, Jim Henderson, during the Committee of Supply's education estimates in 1974 concerned public and separate school board assessments. Hyndman responded that the government planned to look into the matter. What would happen was that the

> corporate portion of the supplementary requisition . . . will move towards equalization by essentially administrative changes and the injections of provincial dollars. . . . It could be more in the range of $11 million, if one is going to move into that in 1975. This would in effect extend the principles of equity and fairness that have been developed and have been increasing in the School Foundation Program over the past two decades. (Legislative Assembly of Alberta, 1974, p. 2986)

This comment addresses the idea foundational to the Supplementary Requisition Equalization Grant that Koziak would introduce in 1976.

Local School Jurisdiction Supplementary Requisitions

Bob Clark, Socred party MLA and former Minister of Education, raised a concern that the supplementary requisitions would become out of control if the government did not take some measure to restrict student costs from rising unreasonably. It would "not be very long until you will be in situation where that portion that you will leave with the local taxpayer is going to become unbearable again" (Legislative Assembly of Alberta, 1972, p. 48-101). Hyndman did not comment other than to say that he was cognizant of the problem. In the 1972 fall sitting of the Alberta Legislature, Hyndman made a ministerial announcement on education finance which in summary said that, "controls over school board supplementary requisitions and funds raised from local taxpayers would be retained" (p. 67-14).

Grant Notley, New Democratic Party MLA, asked about the inequities produced by the variance in local school board supplementary requisitions; and Koziak opined that supplementary requisitions were there to address local needs and demands. Further, he felt that it would be impossible for the government to attempt to fund the local requirement as determined by locally elected trustees and according to the needs of local electors. This was best left up to the local school board to decide and fund as they saw fit (Legislative Assembly of Alberta, 1976, p. 752).

Amendments to the School Act were sought and passed in 1977 allowed corporations to indicate whether they wished their assessments for education to go to public or separate school jurisdictions. Koziak explained, "This intent was recently confirmed by a decision in the Supreme Court of Alberta" (Legislative Assembly of Alberta, 1977, p. 849).

In the 1981 spring sitting, King expressed concern about how public education was structured, particularly about how finances were delivered to school jurisdictions. King received a special educational finance report, and one recommendation was to review the financial structure of funding. He addressed this in the Committee of Supply during the time of the Department's estimates in May 1981. After analyzing the 1981 Minister's Task Force on School Finance, he stated, the Department "will recommend a number of new financial models for education in the province for the next 20 years" (Legislative Assembly of Alberta, 1981, p. 497). The Department had learned that the local tax effort of many school jurisdictions in Alberta was below the requisition levels allowed by the province. This effort, on average, was also below the Canadian average (Legislative Assembly of Alberta, 1981). He did not see a problem with the provincial contribution to public education because local jurisdictions still had funding on which to draw through their supplementary requisitions.

When challenged in 1986 to consider the "85/15 rule," Betkowski argued against it. The rule was a concept in which the government would provide 85% of the funding, and the remaining 15% would be raised by local school boards through supplementary requisitions. Her rationale against such a move took into consideration what had occurred in 1974-1975 when the government "pulled off from that levy [supplementary requisitions] from residences and farms" (Legislative Assembly of Alberta, 1986, p. 882). She said that the local municipalities had taken advantage of the room that they were given to raise property taxes, and she believed that moving to the 85/15 rule would likely have the same effect of giving the municipalities more taxation room. Alberta's local taxation for education was the lowest in Canada, and this was a second reason not to accept the 85/15 rule. To avoid what had happened in 1974-1975 if the 85/15 rule was put into place, Betkowski believed that the government would have to control the school boards in some form to limit their supplementary levy. This, she contended, would not be favoured by school boards. Ergo, there was no need to change the arrangement of funding education (p. 882).

Two years later during debate on the estimates, Betkowski once again addressed the call from the Official Opposition to increase the government's share of education funding to 85%. She responded that to move to such a share would mean that local school boards would lose local autonomy, and she maintained that "the ability of school boards to supplement what the province gives them from their local tax base is a principle which, I believe, has served education well in this province" (Legislative Assembly of Alberta, 1988, p. 613). The other option, which she considered untenable, was for school boards to set their budgets, and then the province would pick up 85% of the cost, essentially giving school boards a blank and unsigned cheque to do with as they wished. She added, "Equity in terms of 'How do we give fair opportunities to our kids?' is a fundamental issue in education today" (p. 615) that would not be improved.

Corporate Pooling

Ty Lund, PC MLA, challenged Dinning on raising "the spectre of the dreaded corporate pooling, a scheme" (Legislative Assembly of Alberta, 1990, p. 2455) that school boards and municipalities thought had been put to rest two-and-a-half years earlier. Dinning responded that the Minister of Education had constitutional and legislated responsibility to ensure that every child had "equal access [and] an equal opportunity to a quality education" (p. 2455) regardless of where the child lived and the relative wealth of his or her community. If school boards did not have a sufficient tax base from which to draw, then they had difficulty raising their share of the education costs unless they unduly burdened the local taxpayers. This was unfair to the children, and a solution to the inequities had to be found quickly, he said. First,

> under my proposal non-residential properties will be taxed for education purposes only. Secondly, the provincial assessment system would be overhauled and brought into the 1990s. Revenues would be protected in an educational trust fund, and the autonomy of operating school boards in this province would be maintained. (p. 2455)

The timeline to bring this solution about, Dinning stated, was March 1991.

Three days later, Dinning again defended his plan in the legislative assembly, this time when presented with questions from Yolanda Gagnon, Liberal MLA. He said that the proposal had been put to school boards and Alberta School Trustees Association (ASTA) and that those discussions were ongoing. He restated his objective "to make sure that every single student in [Alberta] has access to the right of education that they rightfully have and must have" (Legislative Assembly of Alberta, 1990, p. 2555).

Five days after Gagnon raised her question, Woloshyn asked Dinning when he would introduce legislation to protect the money in the educational trust fund. In addition, Woloshyn asked whether all of the provincial education funding, not just the corporate pool, would be protected by the legislation and be used only for education. Dinning did not answer the questions directly, other than to say that he had laid out his plan and that the SFPF funding had always been spent on education (Legislative Assembly of Alberta, 1990, pp. 2650-2651).

On December 11, 1990, Decore announced that the school trustees had reviewed Dinning's proposal and that the majority had rejected it. He asked Dinning why he had refused to accept the majority's' rejection of the plan. Dinning replied that the trustees were being asked to review the whole question of inequities between school jurisdictions, and he was asking them to present a solution. Decore added that the Alberta Urban Municipalities Association had also rejected Dinning's plan (Legislative Assembly of Alberta, 1990, p. 2766). Dinning's response was that

> only non-residential properties would be taxed by the province. Revenues would be protected in an educational trust fund. . . . Autonomy of school boards to determine collectively what would go into that pool and individually the rate at which it would be drawn from that educational trust fund would be housed in legislation. (p. 2767).

The next day, Woloshyn raised the issue of the educational fund again and accused Dinning of setting up a fund that addressed a political need of the government rather than an educational need (p. 2808).

Dinning's plan of corporate pooling was apparently facing opposition within his caucus and from the opposition parties, a majority of school boards, and the municipalities.

Three years later, in 1993, early in the Legislature's sitting Norman Weiss, PC MLA, asked Jonson whether he intended "to resurrect and implement corporate pooling" (Legislative Assembly of Alberta, 1993a, p. 1976). Jonson replied, "The problem of unequal access to a sufficient local tax base continued to be major problem across the province" (p. 1976). There were alternatives to resolve this problem, "almost all of which involve some pooling of nonresidential taxes. One of them . . . is the education trust fund, which involves full pooling" (p. 1976). Jonson was hopeful that "consideration of the whole equity issue can take place during the upcoming budget considerations" (p. 1976)

Taxation and Funding Equity

In the debate on the Department's budget in 1986, Halvar Jonson, a newly elected PC MLA, raised the question of corporate pooling. He opined that rural sparsely populated school divisions had a difficult time in meeting the needs of students because of the lack of a wealthy tax base and that a corporate pooling of funds from across the province would assist in achieving adequate funding in these underfunded school jurisdictions. Betkowski did not respond (Legislative Assembly of Alberta, 1988, pp. 829-830).

Woloshyn asked Dinning, the Provincial Treasurer, about Premier Klein's campaign platform in which he advocated phasing out the Machinery and Equipment (M and E) tax. "In 1991," he said, "an estimated $100 million of M and E taxes went directly to pay for education." Dinning replied that the tax generated a large amount of revenue for education; however, it was a major obstacle to the likes of the petrochemical industry expanding and taking advantage of some tremendous opportunities ... over the following 10 years" (Legislative Assembly of Alberta, 1993b, p. 2075). At the encouragement of Premier Klein, the elimination of the M and E tax was considered in 1993. Jonson said in the Legislature that if it was eliminated, there would be a need to replace it with another source of revenue. He was leaving the recommendations on this issue up to the Financial Revue Commission (p. 976). Five years later when Mar was question on this topic, he said that no new corporate tax was to replace the M and E tax because there was an expected "$3.5 billion increase in investments in [the Alberta] economy that [would] provide sufficient added tax revenue . . . to offset the removal of the M and E tax" (Legislative Assembly of Alberta 1998, p. 758).

Woloshyn followed up by asking when Jonson would implement the Alberta School Boards Association's proposal on equity. Jonson said, "It is my intention to put forward a proposal with respect to improving equity funding in the near future . . . as part of the overall budget process" (Legislative Assembly of Alberta, 1993a, p. 2075). Jonson's proposal to address equity would include corporate pooling.

On questioning from Bill Payne, PC MLA, Jonson acknowledged the government's move to take a one-year lottery dividend to help with the problem of fiscal equity. He said the issue was "the inequity among school boards in their ability to raise per pupil moneys from local taxation" (Legislative Assembly of Alberta, 1993a, p. 2312) and that "a very important aspect of the equity payment is that it goes to those school boards that are in need, . . . the poorest school boards in the province" (p. 2312).

Yolande Gagnon, Liberal MLA, asked Jonson about adequate funding and the priority of educating children. He replied, "There have been very significant additional dollars put in to cover enrolment increases to equalize across this province the ability of school boards to spend on education. The majority of school boards are receiving additional money" (Legislative Assembly of Alberta, 1993a, p. 2625).

Jonson introduced the 1992-1993 supplementary estimates for the Department in January 1993. He asked for an extra $26 million for the Department, of which $100,000 was intended to support projects, one of which was "an analysis of various matters with respect to the whole fiscal equity debate" (Legislative Assembly of Alberta, 1993a, p. 1981).

Stan Woloshyn, New Democratic MLA, who in a matter of three months would cross the floor and join the PC government, challenged Jonson on the government's endeavours to achieve equitable funding for school jurisdictions:

> The minister tried to paint the picture of education funding as being strictly a matter of unequal access to tax resources. . . . The real reason for the problems in education funding has been an ongoing unfairness in the process of allocating funds from the government, an ongoing claw-back by changes in regulation to formulas that have been approved. (Legislative Assembly of Alberta, 1993a, p. 1981)

Jonson responded that a formula was in place and that there had to be adjustments because of budget restraints to address the question of equity. In that current fiscal year, Jonson estimated that it would take $25 million to $30 million to fully fund the equity formula. He wanted a debate on equity (p. 1989).

Available funding for education from one school district to another varied across the province. Jonson informed the Legislature that some school jurisdictions had operated with about $4,400 per student per year, about 20% below the average in the province (Legislative Assembly of Alberta, 1993b, p. 974).

Don Tannas, PC MLA, complained to Jonson that some of his constituents had received education tax increases of up to 24% on their property tax. Jonson replied that the net mill rate for the province had not been increased and added, "There has been an increase in assessment, and that assessment . . . will be taxed by the province for the purposes of paying equity during this transition year" (Legislative Assembly of Alberta, 1994, p. 1771). Furthermore, increases would be limited to and capped at 5% so that "extreme changes will not take place this year in what they have to pay" (p. 1771) and over the following three years "a phasing up of low will rates in the province and phasing down of those above the provincial average," would occur (p. 1771). Jonson gave a similar answer to a similar question just a few days later (p. 1824).

Electrical power and pipeline (EP and PL) had a linear assessment applied to it in 1993. Ty Lund, Progressive MLA, asked whether this type of assessment would remain the same in 1994, and Jonson responded that the government would apply the average net mill rate against EP and PL. This would result in a net benefit to the pipeline and power line industry, according to Jonson (Legislative Assembly of Alberta, 1994, p. 1869).

Jonson claimed that the "obvious benefits of full provincial funding is that students will be entitled to attend school in the own school district or outside their district provided there is room in the school operated by another board" (Legislative Assembly of Alberta, 1994, p. 1136). A key concept was that the funding would follow the student. When a separate district opted out of participating in the ASFF, that district would be entitled to charge tuition for students who resided outside of the district. Jonson addressed the amendments to the bill following this round of debate when it resumed on May 17, 1994, and stated that the amendments sought in section 28 "provide that students have access to either of the two publicly funded systems" (p. 2033).

During questioning from Decore on changes to the amount of taxes collected for education, Jonson explained, "The relative ratio between general revenue funding and local tax revenue for the coming year is 58 percent provincial, 42 percent local" (Legislative Assembly of Alberta, 1994, p. 2046). He also said that the government would be "accessing the revenue from the real property aspect of growth in the province and applying that to . . . the $30 million along with 'EP and PL' and the school foundation program levy increase for the betterment of education in the province" (p. 2963). He added later in the session that if there was any growth in these funding sources, it would go "towards the cost of education or possibly in the overall reduction of the provincial mill rate" (p. 2963).

In October 1994 Bonnie Laing, PC MLA, asked Jonson about the status of the Calgary Board of Education's claim that a net $14 million in tax revenue would flow out of the city under the ASFF. Jonson answered that the $14 million was the Calgary board's estimate, not the government's (Legislative Assembly of Alberta, 1994, p. 2433). Frank Bruseker, Liberal MLA, followed up with a question—"Why did . . . officials from the Department mislead the Calgary board?" (p. 2435)—concerning the $14 million. Jonson replied that there was never any pretence that school boards would see an adjustment to their funding in the province's attempt to gain equitable funding across the province (p. 2435).

The government was collecting 30% more from Ft. McMurray property taxpayers, and Germaine, Liberal MLA from Ft. McMurray, asked why the students had to be bussed up to an hour and a half to get to their school. Premier Klein responded that the government had supported the oil sands and the development of the infrastructure for over 30 years prior to 1995 to make the city the thriving centre that it was and that Germaine had nothing to do with that success. Jonson added that in order to achieve greater efficiency and effectiveness, some of the school facilities had to be closed; hence, students needed to be bussed. Further, Ft. McMurray was receiving transitional funding to overcome the challenges presented by having to adjust to the new funding framework (Legislative Assembly of Alberta, 1995, p. 13). To a supplementary question from Germaine, Jonson replied that the government was taking a position that focused on students and that the funding was equitable across the province. This meant that the relative wealth of one area had to be shared with the rest of the province and that there would be no special deals with any school district just because they paid more into the ASFF. Germaine told the Legislature that Ft. McMurray school jurisdictions had taken an 8% cut in funding in the 1994-1995 school year and that the mill rate was 4 mills higher than the provincial average of 11 mills. He then asked the Legislature to show Ft. McMurray more fairness with respect to funding (pp. 13-15).

On April 25, 1995, Jonson, the Minister of Education and Tom Thurber, the Minister of Municipal Affairs, announced the application of a uniform education property tax rate for municipalities; and Bob Renner, PC MLA, asked how it was being implemented. Jonson responded that the move was to provide "on a fair and equitable basis a means of paying property taxes towards the support of education" (Legislative Assembly of Alberta, 1995, pp. 1290-1291).

In 1999 David Coutts, PC MLA, commented that municipalities were concerned that education took up much of the available tax room available from property taxes. This curtailed the amount that municipalities could collect for much-needed local municipal programs. Mar attested, "Education property taxes have been used to fund education in the Province of Alberta since the early 1900s" (Legislative Assembly of Alberta, 1999, p. 344). He added that using property taxes for education helps to ensure that education is accessible to all and that the responsibility is shared equitably by all in Alberta.

Transportation. During the initial budget reductions to education, Burgener asked for an explanation of open boundaries for schools. Jonson replied that the School Act stipulated that students have the opportunity to attend any school in the province provided that it has the space and resources for the student and that "the funding framework provides that all instruction and related funding will follow the student to the jurisdiction with the exception . . . of any funding provision for transportation" (Legislative Assembly of Alberta, 1995, p. 1554).

Transportation funds listed in the estimates were not distributed on a per-pupil basis. Rather, the funding that went to each school jurisdiction depended on the number of students who needed transportation and the distance that they had to travel. Changes were being phased into the funding of transportation to address the needs of school jurisdictions. Mar assured the Legislature that no school district would receive less funding than it currently had. Some jurisdictions would receive increases that varied based on the two factors (Legislative Assembly of Alberta, 1998, p. 759).

Other Findings Relevant to the Study

Woloshyn asked Dinning how he planned to address equity, and Dinning responded by restating the question: "[What is] the criteria by which this government will decide how we will change equity funding so that in fact all students have access, with reasonable limits, to the same quality of education no matter where they live?" (Legislative Assembly of Alberta, 1990, p. 592). The solution that he was seeking had to take into account the variation of educational costs among school jurisdictions and a variation in the local mill rates for education across Alberta (p. 593).

Other changes of note in Bill 19 were that the number of school boards would be reduced from about 160 to 60, according to Jonson (Legislative Assembly of Alberta, 1994, p. 1137). Combined with fewer administration positions, which Stephen West, PC MLA, referred to as "streamlined administration" (p. 1443), the government believed that schools would be more accountable to the parents and the people in the community.

When the debate on the estimates resumed on March 23, 1995, Jonson restated that the government wanted

> a quality education where there are standards and where there are performance measures. It will be fairly and equitably funded. . . . It will be based on providing the best possible education for all students in [Alberta] in our separate and public schools. It will be one which is adaptable, which will be flexible enough. (Legislative Assembly of Alberta, 1995, p. 797)

Jonson was of the opinion that the funding framework was the fairest and most equitable that had ever been available for both the public and separate school jurisdictions.

Henry accused the government of cutting a quarter of a million dollars in general revenue funding from education and putting Alberta in fifth to eighth place compared to the other provinces in Canada. Jonson did not deny the amount of the budget cut; however, he did say that the government was focusing on reducing the provincial debt and that education was part of the cut. Further, education realized a cut in its budget that was "significantly less" (Legislative Assembly of Alberta, 1996, p. 123). Despite the cuts, the "system today is still performing well. We are achieving improved results on achievement tests, . . . [and the system is] . . . leaner, it is more efficient, but it is getting the job done" (p. 123).

When Jocelyn Burgener, PC MLA, asked whether there were provisions "within the funding framework to dedicate dollars to the growth and salary costs within the grid" (Legislative Assembly of Alberta, 1997, p. 504), Mar told her that there was no such provision. This was a concern that local school boards had to address to manage their own human resource costs. Burgener followed up with a supplementary question about whether the funding framework addressed issues such as the education experience of the staff in school jurisdictions, such as Calgary Public Board was experiencing. Mar responded:

> The Calgary Board of Education has about 70 percent of its teachers in the top end of the pay scale. . . . By contrast, the Calgary Catholic board has about 50 percent. . . . So the responsibility for developing a balanced human resource strategy for a school board in the employment of teachers is clearly a very significant responsibility of school boards. (Legislative Assembly of Alberta, 1998, p. 1014)

In the fall sitting of the second session of the Legislature, Burgener inquired about the findings of an educational review team on the CBE. Mar said that the team, amongst other things, had found that a pupil-teacher ratio dictated by the collective agreement with teachers and significantly higher average teacher costs put pressure on the Calgary board's budget. To deal with these issues, Mar saw the board as responsible for taking the lead and dealing with the issue (Legislative Assembly of Alberta, 1998, p. 2147).

Massey gave examples cited by a parent from Entwistle where classes had up to 37 students in elementary grades. He asked Premier Klein whether this was acceptable. The Premier referred the question to Mar, who said that the government distributed equitable funding to school jurisdictions and that they had received this very positively. The school jurisdictions made their own decisions on what class sizes would be and how the funding would be expended (Legislative Assembly of Alberta, 1999, p. 52). Later in the session Massey asked what impact the increased funding would have on the pupil-teacher ratio in Alberta. Mar replied that there was no provincially set pupil-teacher ratio and that it was an issue with which the local school boards dealt (p. 585). Others raised this question at other times during the session (pp. 1271, 1315, 1472, 1714).

Conclusion

The *Hansard* record allowed me to consider what was said and emphasized to determine the nature of the debate, the issues, and what might have influenced the decisions that led to the government's actions to address fiscal equity and equal educational opportunity.

Much like the government documents reviewed in Chapter Four, the Hansard record showed that the PC government in the early 1970s began to speak about the changes it intended to make in the way that it made educational opportunity available. In the 1990s the tenor of the debate is seen to have taken a significant shift from equal educational opportunity to an emphasis on fiscal equity. In addition, it is clear that the debate shows the Ministers' interest in the 1970s and 1980s in listening to and taking the suggestions offered by all parties represented in the Legislative Assembly. By the mid-1990s this appears to have shifted to the Ministers' defending the government's position on fiscal equity and not listening to or taking the advice that the opposition parties offered.

According to Hansard, related themes appeared to emerge in a similar manner and timeline, as seen in the government documents that I reviewed in Chapter Four. Hyndman addressed funding improvements for students with special needs early in the PC tenure, and Koziak focused on levelling the funding between grade levels and on the drive to improve the level of university education for teachers. As Hansard recorded, the Ministers' perspective on equity changed, as did their perspective on how it should be delivered. Throughout the 30 years there appears to have been an effort, as the Ministers in the Legislative Assembly affirmed, to improve the equitable distribution of funding and equal educational opportunity. Most notably, the language used by the Ministers in the 1970s and 1980s appears to have changed, as well as the emphasis placed on equal educational opportunity, to a focus in most of the debate in the 1990s on fiscal equity and surrounding issues.

Over the course of the 30 years, the PC government addressed questions, entered into debate, and presented a view in the Legislature that it wished to improve equity in public education. It is evident that each minister brought his or her own beliefs on the subject to the Legislature and either maintained what had previously been in place or attempted to improve fiscal equity for taxpayers and provide an equal educational opportunity for students.

CHAPTER SIX:

INTERVIEWS: CABINET MINISTERS

Introduction

Prior to each interview, I wrote the former Ministers of Education a letter and provided them with the set of questions (Appendix E) that I would ask them, as well as a set of definitions for equity (Appendix G) and the consent form that I would ask them to sign if they agreed to the terms, which they all did.

I photocopied the *Hansard* statements that were relevant to the study, reviewed them, and then provided them to the Ministers of Education prior to their interviews. All of the ministers accepted these statements except for David King and Halvar Jonson, who felt that it was not necessary. Of those Ministers supplied the Hansard passages, only Hyndman and Betkowski acknowledged that they had reviewed the material. The others told me that they had not had time, so they returned the material to me without referring to it in the interview. I used the photocopied material to help me recall the relevant events.

Following the interviews, the tapes were transcribed and the transcripts summarized. I sent the summarized drafts to each of the interviewees, asked them to edit the text and provide feedback, and made the changes that they noted to the summaries found in this chapter.

Each interview summary is arranged in the order in which the ministers were first elected or served as Minister of Education. Therefore, Bob Clark is first and Gary Mar is last. One person, Ray Speaker, was not a Minister of Education; rather, he held portfolios in both Harry Strom's Socred government and later in Don Getty's PC government and provided a perspective from 1963 to 1992.

Robert C. Clark: Minister of Education (1968-1971)

I interviewed Robert C. Clark near the end of his term as Alberta's Ethics Commissioner. He had been attending activities related to his role in Calgary when he made himself available on February 14, 2003, for an hour-long interview over lunch in a downtown restaurant. Over the noise and bustle of the restaurant, Clark recalled his time as an MLA and Minister of Education.

At age 23 in 1960, Clark was elected to the Legislative Assembly of Alberta. In 1966 he was appointed Minister of Youth under Premier Ernest Manning, followed by an appointment as Minister of Education in 1968. When the Lougheed PCs took power in 1971, Clark joined the Official Opposition as leader from 1977 until his resignation from provincial politics in 1981 (Office of the Ethics Commissioner, 2003).

Clark recalled the SFPF as a "real hot issue at the time" when it was introduced in 1961:

> The government was taking equal assessment tax money and putting it into a fund, . . . then set together a program where school boards got so much money depending on students. It was a way to give equal opportunity across the province. Because prior to that, there had been a number of jurisdictions that had a lot of money, very big industrial complexes and we had a lot of areas that didn't.

He could not recall having had a discussion on fiscal equity or equality during the 1960s. Instead, the discussion focused on how to give students an equal opportunity to receive an education no matter where they lived or how wealthy their school district was. The SFPF was considered a vehicle that would achieve that goal. School trustees soon began to "systematically pick away and say that we have students in particularly isolated areas and you have to do something for their transportation." Trustees raised concerns about students with physical handicaps who were excluded from education in a school setting. Shortfalls in funding for handicapped students came to the attention of the Department. Clark recalled that the government responded by reviewing and amending the SFPF program in 1969. However, local school boards could, if they saw the need, requisition tax funds for education through the municipalities in their districts.

After making major changes to the School Act in 1969, Clark recalled that his Department

> developed the regulations for the Foundation Program which where based on giving kids all across the province an equal opportunity. We realized that money from the Equalized Assessment was going to help prop up areas where the school jurisdiction had a small population or had poorer jurisdictions.

Clark remembered that the real changes to revenue and funding for education had been initiated as a result of pressure from school boards and special interest groups, particularly in the areas of early childhood education and students with learning disabilities. In 1966-1967, he recalled, these special interest groups gained more attention from the government, often piggybacking their concerns on school board submissions, given the declining influence of the Home and School Association. The Canadian Centennial Celebrations in 1967 encouraged nongovernment organizations (NGOs) to form and seek funding for their particular special projects. From this context, Clark believed, came more savvy and sophisticated groups of people who turned their advocacy skills to urging government to address a variety of causes, including special programs for the handicapped. Clark explained that the Department under his leadership

> started a move on the issue of addressing the educational needs of the handicapped, but there was a lot of push by other groups and the Conservatives took it up, very much so, to help the handicapped get more than the basic foundation support in the public system.

Academic influence came from within the Department, according to Clark, not from outside as some had alleged. When Dr. Swift and Dr. Byrne were deputy ministers, "they had a very successful program of sending people, young, bright superintendents, down to wherever to get PhDs, and a lot of them did go to the States." Clark personally

> encouraged that because most of them as school leaders in Alberta had their undergraduate degrees here in Alberta. So, there was no sense kind of piling on top of that the same bias that you get from your basic degree. And that's not being critical of Alberta or the University of British Columbia, but it brought new ideas to the Department.

Clark initiated the Worth Commission in 1969. The impetus initially came from an Ontario business report that spoke to education; however, a number of other influences brought about such a review for public and postsecondary education. For example, Harry Strom, a former school trustee, had just become Premier; the Provincial Treasurer had just moved from the education portfolio; a review of education in Alberta had not been completed in 10 years; the Human Resources Development Council was being established and pressed for the review; former Premier Manning had published a white paper on human resources; and the Socred caucus had considerable interest in education. The government and bureaucracy saw a need for a comprehensive review of education in the province, and Dr. Worth was selected to chair the commission. Clark's recall of the progress of the Commission was that

> it got a bit off course. Once these things start, they have a life of their own. I think the commission's report was seen as being kind of a little airy-fairy, wishful-thinking kind of stuff that you might keep in mind for 10 or 15 to 20 years, as opposed to something that could be used in the short term.

In the late 1960s provincial school boards and the ATA under the leadership by Bernie Keeler continued to lobby effectively for improved education funding levels because of the less-than-desirable funding levels that the government had provided through the SFPF. As a result, Clark recalled that in 1969 and 1970 there were large increases in the amount of funding appropriated to school jurisdictions through the SFPF; however, the trade-off was that school boards were limited to increasing their supplementary requisitions by 3%. If they wished to exceed that limit, they had to take the request for an increase to the electorate through a plebiscite. Clark reported, "The Opposition was furious over that. It was denial of democracy [in their estimation], and I argued that it was the greatest democracy. Let people—they get to decide." Municipalities were pressuring the government at the time to curtail the school boards' ability to increase the supplementary requisitions, and, in Clark's recollection, the municipalities were more popular with the government than the school boards were. The boards did not take any request for an increase over the 3% limit to a plebiscite.

Clark believed that the government needs to be careful about the direction to include all children in a classroom and that there is a place for educating students with disabilities in programs other than those provided in the regular classroom. He cautiously added, "We have to be careful how far we go when we say we're going to provide equal opportunity. The opportunity doesn't guarantee success, and it is often expensive."

Clark's evaluation of equity for students was that

> we're never going to have a Foundation Program, whatever you call the effort to equalize funding. That's going to be absolutely equal across the province. The factors that affect funding change every year. This province is changing so much. You've got the fastest urbanizing area in Canada in Calgary and Edmonton.

Despite of some people finding fault with the funding arrangements for public education in Alberta, Clark felt that the system is doing very well compared to other systems across Canada and internationally under whatever measure is applied. However, in Clark's view, solutions need to be built here in Alberta as they have been ever since he could remember from the time that he entered politics in 1960. Alberta has been on the leading edge of education in many areas: the introduction of lifelong learning, technology institutes, an open university (Athabasca University), introduction of a school foundation program, and teacher certification that required a minimum of four years' training and a bachelor's degree. "We are a populist people; always have been, and I hope we always will be," Clark concluded, "and we make our own decisions."

Ray Speaker: Minister of Municipal Affairs (1989-1992)

I interviewed Ray Speaker on January 27, 2003, at his home on his farm south of Enchant, Alberta, for about two hours. He willingly shared his memories and perspectives as a Member of the Legislative Assembly (MLA) of Alberta. Speaker candidly also shared his opinions on the current political issues facing Alberta.

Before being elected MLA, Speaker had been a teacher who was active in his ATA local and had sat on the ATA Economic Policy Committee for the bargaining unit.

He was elected an Alberta MLA in 1963 and reelected in seven successive elections until he resigned on January 3, 1992, to run federally as a Reform party candidate. During his time as MLA, Speaker held portfolios in the Alberta Socred government Cabinet as Minister Without Portfolio (1967), Minister of Health and Social Development and Minister of Personnel (1968), Minister of Human Resource Development (1969), and Minister of Health and Social Development (1970). In 1971, after the Socred party lost the election, he began sitting in the Official Opposition and was its leader from 1980 to 1982. He remained in the Opposition until 1989, when he joined the Getty PC government. Speaker was appointed to Getty's Cabinet as the

Minister of Municipal Affairs and Housing (1989-1992) while Jim Dinning was the Minister of Education (Flanagan, 1991, p. 523).

Boundaries of school divisions and municipal districts were among the issues that Speaker addressed in Municipal Affairs, with frequent interactions with Dinning over issues that touched on municipal affairs and education. Speaker and Dinning discussed not only boundaries of school districts, but also the size of school districts, the administrative costs in districts, and the overlap of services. Before Speaker resigned in 1992, a decision to reduce the number of school boards from 142 to 40 was reached.

As Minister of Municipal Affairs, Speaker viewed taxation within municipalities, counties, and improvement districts and the distribution of wealth as major concerns for both Education and Municipal Affairs. He recalled that Dinning agreed. They found inequity in wealth among the various school districts. Some northern districts had little resource-based wealth, whereas the County of Strathcona had a large resource tax base. Speaker and Dinning agreed that some formula for redistributing the wealth was required.

Speaker entered the Cabinet as Minister of Public Welfare in 1968, and he recalled, "As far back as 1968 local school boards in the province wanted more autonomy along with local responsibility for the direction of education." The Department signalled the move to grant local autonomy by amending the School Act to give local school districts rather than the Department, as had been the case up to 1969, the responsibility for hiring their own superintendents. Speaker remembered making some adjustments to the School Foundation Program at that time, with two general objectives: (a) to give districts more local autonomy and (b) to try to give each district an equal share of funding on a per-student basis. However, Speaker reported:

> The discussion was not around equal opportunity for the student; . . . wasn't the discussion at the time. The discussion was all around giving every jurisdiction the same amount of money on a per capita amount for each student so that they could fund local education. The question was never asked at that time, "What does government do to give every student in the province of Alberta equal educational opportunity?"

Speaker recalled that rural MLAs were a significant force in determining Alberta government policy until the mid 1980s: "Rural Alberta would have had a major influence on fiscal equity policy and equal opportunity policy for the students of Alberta." This was the case until the balance of power moved to the urban Conservative MLAs from the mid 1980s until the current time.

The School Foundation Program, a move to address the varying levels of wealth amongst school districts, came into effect in 1961, two years before Speaker became an Alberta MLA. He noted, "In 1955, the fiftieth anniversary of Alberta entering Confederation, there were special programs introduced because of the oil revenue dollars available in Alberta." Education was a benefactor with a large increase in funding because it was considered the first priority at that time. Speaker said, "It was very politically strong in the mix of budgeting. Schools were needed, and as a special program in 1955, a school building program was launched."

Speaker recalled that special projects came in response to a promise that the Socred government made when it was first elected in 1935:

> When the province, through its resources, had enough revenue, the government would distribute to Albertans a dividend that would be paid to each Albertan because they had developed their country well. The extra revenue from oil provided extra money, and people could then be given a dividend to help them with their personal needs, whatever they were. Two dividends were declared; one dividend was given out in 1956 and one in 1957. The dividends were $25 per individual in the province of Alberta.

According to Speaker, there was a negative reaction to the dividends: "People saw their money being spent in the liquor store and in the bar, and welfare people were wasting it on cigarettes." The Premier of Alberta, Ernest Manning, "received huge piles of letters that said, 'Stop handing out money. Don't give it out this way. We don't want any dividends.'" Manning clearly heard the message and did not pay dividends again.

Speaker remembered that during the 1959 election the government put into place the Five-Year Program. The Alberta government developed a list of special projects to address perceived needs in education, one of which was the school building program, and another was the 1961 School Foundation Program. Other projects included building roads, parks every 50 miles, and auditoria in Edmonton and Calgary to enhance the arts. These 10 to 15 "very special programs were well accepted by Albertans," Speaker recalled. The government bragged about its accomplishments. Thus began using oil revenue to fund special projects, which created a circumstance in which the government also started to fund local school divisions at increasing levels. The goal was to give each school jurisdiction an equal amount of money. The School Foundation was created to meet that goal. The government sought to be fair in distributing funds for education through equal distribution of the educational dollar. Speaker recalled:

> I can still see Anders Aalborg, the Minister of Education, in Cabinet. I can still see him sitting in our caucus. I can still see him standing up in the Legislature talking and saying, "We are financing education and a major portion of our budget is going towards education through the School Foundation Program [SFP]. Each year the SFP was enhanced with the objective of providing equal access for students to education."
>
> We were a government coming out of the dirty '30s. A new reality started in 1947 with the discovery of oil in Alberta. We now had a new source of revenue from where we could fund programs in ways that we had not dreamed possible. By the 1960s we began funding school libraries, building new school buildings and could distribute funds to school boards with confidence.

Core academic curriculum subjects continued to be the focus. However, as the economy continued to improve, other issues of education rose on the priority list. Vocational and technical training broadened the opportunities for school children.

From 1959 to 1966, as part of the Socred Five-Year Program, handicapped children and adults were offered special programs and facilities. Special training centres were established for those with mental and physical handicaps. Two program centres were set up in Alberta: the VRRI Vocational Rehabilitation Centre in Edmonton and the Institute of Training and Rehabilitation Centre in Calgary. These training institutions for the mentally and physically handicapped taught vocations and employed their clients through contracting out activities to private business. The federal government cost-shared the programs, on a 50-50 basis. Ernest Manning, Premier of Alberta at the time, asked Speaker to establish budgets for the two institutions. A shift in public policy allowed handicapped individuals to enter society more fairly, to live on their own, to work in these training environments, and to live in special accommodation provided at the institutions where necessary. However, the public attitude toward handicapped people was that they constituted a separate group for whom the government must provide programs separate from the mainstream of Alberta life. The object was to avoid giving such handicapped individuals access to the public education system within the regular classroom; there was no thought of such inclusion at that time.

Special education did not receive government recognition until the late 1960s. Parents of children with special learning needs began to lobby the government and request greater support for children with disabilities who were not addressed or supported within the public school system. An example of this increased lobbying came from a woman who telephoned Speaker in 1970 to ask for assistance for her child with Down's syndrome. The woman, near hysterics, was insistent on receiving support from the government. However, Speaker recalled that his Socred government of the day did not have policies that were responsive to this woman's plight. The Minister of Health, Dr. Ross, had a policy that the government would not take the child as a ward of government until his or her fourth birthday. Speaker believed that the woman, like numerous other parents, found a more responsive audience in the ranks of the official opposition, the Lougheed PCs. Why there was a shift in Albertans' thinking, Speaker opined, was that

> parental attitudes shifted where the traditional homesteader or the rural parent looked after children with handicaps, kept them at home, and felt embarrassed about it. All of a sudden, in the 1960s there was a new breed of person who was university trained, out in the world more, and said, "I can't handle this. I'm not going to handle it. The state can look after the handicapped child."

In 1970 the Socred government under Harry Strom organized the Premier's Council on the Status of Persons with Disabilities to represent the handicapped and other special-needs children in the province. The group made presentations to Cabinet and to the Opposition. Lougheed retained the council when he came into power and supported it and its goals; it was still in operation in 2003.

By the 1971 provincial election an effective lobby group had formed around the policy issue of special needs and the necessity to reform how public education responded to and accommodated these children. This lobby group grew in political strength coming into that election, and the PCs campaigned using the platform plank gained from the lobby group that addressed handicapped and special-needs education, which in turn gained popular support amongst the electorate interested in improvements for disabled individuals with handicaps and those with other educational special needs. For Speaker, this was one of the issues that the Socred government had not effectively addressed and that contributed to its defeat at the polls in August 1971. Within weeks of the election, the new PC government had established centres in Edmonton and Calgary to begin to address the needs of a broader base of handicapped children in Alberta. The new facility rooms were painted blue and orange in recognition of the change in policy.

Parents and lobby groups brought new and continued pressure for regular school classes to accommodate children who were handicapped, whether mentally or physically, within the regular school environment. In turn, the move to accommodate these children created difficult circumstances because most teachers were not trained to teach handicapped students in the regular classroom. Local school boards did not have the financial resources necessary for these new programs; they were something that had not been done before in Alberta. The demand for changes to policies to address the needs of the handicapped combined with the "huge surpluses of money in this province of Alberta" between 1975 and 1982 drove improvements for educating the handicapped in Alberta.

A court case brought by a Lamont mother on behalf of her disabled child resulted in support for her claim that the school board's decision was wrong not to include her handicapped child in a regular classroom. Her victory in court forced the school board to accept her child into the regular classroom. Speaker recalled that this court decision had enormous implications for school systems across Alberta for funding, for training teachers, for the Ministry of Education, and for a move that changed attitudes towards the handicapped.

Influence was brought to bear on the Legislature from many sources within Alberta. However, Speaker did not remember any policy changes that were drawn from the influence of the United States in shaping fiscal decisions or policy in Alberta. Instead he recalled that Manning and Strom called the provincial cabinet together every Tuesday to meet delegations from around the province: professional groups, municipal and school boards, and special interest groups. Manning, he recalled, read every brief presented to him by these delegations, and they had a great influence on the Socred government of the day, including in education. A further significant influence lay in the legislative debate as well at the Socred party's annual conventions.

A noteworthy event for Speaker arose when the province took over collection of property and corporate taxation in 1994 and redistributed funds on an equal basis throughout the province. He recalled that it was a fairer and better way of funding education and an improvement over the previous system in which supplementary requisitions were collected from property taxpayers and corporations to help pay for local public education. When the province took over the right of school districts to levy taxes on corporations, Speaker asserted, "This was a major step to provide equity in the funding of education." The fact that resource revenue could be distributed for the benefit of all Alberta students honoured the day that Premier Brownlee gained control of Alberta's natural resources as laid out in the Alberta Natural Resources Act that had been passed into law in the 1930 sitting of the House of Commons of Canada (Government of Canada, 1930). Premier William Aberhart; Nathan Tanner, Minister of Lands and Mines; and Ernest Manning reinforced provincial ownership of the province's natural resources and ensured that the province's resources belonged to all Albertans and not to the private sector. Because these resources were publicly owned for the public good, Speaker recalled, the province's claim that corporate taxes through Jim Dinning's initiative as Provincial Treasurer to redistribute public education funding equally to school jurisdictions was in keeping with the intent of Alberta's leaders in the 1930s. Speaker believed that the province's public resources should not accrue only to those who live in the school jurisdiction whose boundaries capture the public resources, but rather that all Albertans should benefit equally.

Speaker conceded that some rural schools with four or five students in each grade should not continue to exist. It is not economically feasible to keep such schools open; neither is it possible to offer these students the same breadth of programming as in the large high schools. He recalled that the Getty PC government tried to address the small high school classes in rural Alberta by introducing distance learning. However, Speaker explained that these efforts needed to be carefully evaluated to determine whether they did, in fact, improve the opportunity for rural students to pursue studies usually available only in larger high schools. These efforts, which would have required a great deal of funding, in Speaker's estimation, might not have met the test of equity for students in rural areas in small schools.

Speaker opined that the Department's consolidation of control during the mid 1990s caused the pendulum to swing from the autonomy that local school districts had experienced for the previous 40 or 50 years, from the 1970s until 1994, toward government control when the province began to collect property taxes, approve the hiring of superintendents, envelope education funds, and attach strings to their use. This left few opportunities, Speaker believed, for opportunities for local school boards to make decisions on education in their jurisdiction. To his mind, the loss of autonomy for school boards affected equity because with the autonomy that they had had prior to 1995, they were able to make decisions that met the needs of their students. In turn, equity improved for students as their educational needs were better met by local trustees who best understood their needs. Today school board members are more administrators than educational leaders.

Senior citizens in the province were forgiven a portion of their tax payments for education beginning in the mid 1970s; as Education Minister in the early 1990s, Jim Dinning further reduced them. The province picked up the difference and forwarded money from provincial revenues to school boards. In Speaker's evaluation, this helped to achieve taxpayer equity for an identifiable group, senior citizens, who did not have the same ability to pay taxes as did those who were still in the earning phase of life.

At the conclusion of the interview, Speaker offered whatever assistance I needed to conclude the portion of the study that he had addressed.

L. D. Hyndman, QC: Minister of Education (1971-1975)

My interview with Lou Hyndman took place on April 16, 2003, at 11:00 a.m. in the Edmonton offices of Field Law LLP, where he is a senior partner. His attitude was welcoming, and he showed an interest in my research.

Hyndman was first elected to the Legislative Assembly of Alberta in 1967 as a member of the Official Opposition PC caucus, which later formed the government in

August 1971. He was appointed Minister of Education, a position that he held until 1975 when he was appointed Minister of Intergovernmental Affairs. In 1979 he was appointed Provincial Treasurer, and in 1986 he chose not to run again.

As the interview began, Hyndman identified three beliefs that he and his government held prior to and following their coming into power in 1971: (a) Public education deserves public support, (b) a top-quality education system is desirable, and (c) some standardization to promote a flexible and responsive public education for students is also desirable. He explained, "We [the PC government] felt that public education had to be supported as a duty of taxpayers and was to be reflective of the amount of income they had. Those with higher incomes would pay more." The new government wanted a top-quality education system so that Albertans could move into the mainstream of Canadian society: "instead of being a province that was seen to be an outlier in a region, rather, to become a province that was one of the top three or four in the country." Hyndman recalled that the PCs believed that that could happen over 10 or 20 years.

Hyndman said that there was recognition of the need for a degree of standardization and centralization of the education system because of the 400,000 students in schools at the time. However, the government "thought that the system could be more flexible and allow for greater diversity and greater response to special situations and special needs—recognizing that this meant that individual students would get differentiated amounts of money." Hyndman recalled that there were significant criticisms of the number of programs proposed because they were using more complex methods. Regardless, the government was certain of its course in addressing special-needs education in a better way despite people's saying:

> "Why don't you just plunk the money into the SFPF and let the boards do everything they want?" We felt that there had to be a spark-plugging from the province of new initiatives that would improve education. My view always has been that these programs did not need to last forever. An example is learning disabilities. They were to get needed recognition that there were duties concurrent with funding, and then maybe after 10 or 15 years the funding for the program would disappear when it had been established and effective. That happened.

He gave the example of the EOF, in which funds were made available with the condition that they be used to enhance the elementary program—a program that he believed improved equity, as he had said while he was Minister of Education. Hyndman recalled, "At least some of that money was going into enhancing the numbers and the quality and breadth of experience for teachers in the special education area." In the late 1980s the EOF had met its objectives, and the fund was discontinued.

The demand to address students with special needs came from the people of Alberta. From 1967 until 1971, when the PCs formed the government, "as MLAs we traveled the province and attended meetings from small villages to the big cities," Hyndman said, "and a common theme was addressed by many parents and teachers." That theme was the need to address the special educational programming for children who lacked it within the local school. In 1971 many special-needs students received their education in separate institutions. "They were not in the classroom with kids without disabilities." Concerned teachers complained to the PC MLAs about the gap that they saw between the educational services for regular students and those for students with disabilities. Hyndman reported:

> Our response as MLAs and as a political party was to address these issues through resolutions at our party conventions. We were prepared with a plan so that when we formed the government in August of 1971, we were prepared and able to do something about the issue.

Hyndman recalled that there was an effective lobby group who represented students with special needs and included especially parents with learning disabled children. He recalled that the group had said, "'We estimate about one million children and [related] statistics are affected.' Many were young males, and their IQs were higher than normal." This presentation made an impression on the PC MLAs.

> Generally it was felt that Mr. Manning's administration had been pretty good, but there seemed to be a gap here that we kept hearing about. As we cross-examined people it was clear there was a gap; it was there between what the Socred government was doing and what people were saying.

Addressing handicapped education and special-needs students was one of the issues on which the Socred government was not in tune with the general public. However, Hyndman believed that the PC Official Opposition was listening.

On the issue of integrating special-needs students into regular classrooms, Hyndman recalled it as one that was secondary to the issue of resources for these students; however, parents made themselves heard on the topic. Again, Hyndman spoke to the importance of what MLAs had heard in town hall meetings around the province. Many constituents saw the specialized institutions as too distant from the communities in which their families lived. In the early 1970s

> the question came up as sort of a secondary one as the government members traveled the province saying, "Surely it's beneficial to consider integration into the regular classroom, not only to the students that have a disability or handicap, but to the other students." There are cases where some people recognize you do have to have full-time care for a student, maybe a teacher plus one or two aides. . . . It kept coming forward . . . at the same time as groups like the Canadian Mental Health Association actively encouraged a review of that concept.

Because different school districts had differing abilities to raise taxes, it was necessary to ensure that school districts in the province with a greater tax base share their revenue with those with less ability to raise revenue from their property tax base. Hyndman contended, "Support for education in the rural areas and smaller centres should not be disadvantaged by reason of the fact that they don't have significant property tax revenue." Industries east of Edmonton such as oil and gas, where there were large amounts of money, could help to pay for a reasonable standard of education, whereas children in Fort Chipewyan, where the school district had very little property tax revenue, could not. Hyndman recalled that the Department conducted research that was reflected in government policies related to equal opportunity for all students wherever they lived in the province.

"The Worth Report," according to Hyndman, "was paralleling the messages we were hearing out in the hustings; for example, support of ECS addressed in the Worth Report." Hyndman said that the government established ECS, a program that was to be made available equally across the province for all children—a move that the previous government had failed to make despite of the topic's being debated in the Legislature on many occasions. It was vigorously promoted at PC party annual meetings. Delegates brought examples of ECS programs in Britain, Scandinavia, and the United States to argue that similar programs needed to be available to all Albertans. They said:

> "Look, we have to give children the best possible start in life. Children are now getting increasing amounts of information, and the time has come for having some program of some kind available at around age five. Otherwise we are going to fall behind the rest of Canada because the other provinces are doing some things with the ECS type of initiative.

The objective for the new government was to move Alberta into the front ranks in performing arts, fine arts, education, the professions, and teaching, all of which required that students start their education earlier. While he sat in the Official Opposition, Hyndman recalled, he constantly pushed Bob Clark, the Minister of Education, to inform Albertans about when the government was going to act on ECS. Clark eloquently articulated the other side of the argument. ECS was one of the initiatives that the PCs, as a new government, quickly implemented in the spring of 1972. ECS was one program that Hyndman was pleased to see offered. He remembered that "that report was out in the community as well. It sought about a thousand opinions, as I recall. We were getting the same concept and messages that later were given to us by the Worth Report." Hyndman remembered:

> We sat around the caucus table in the fall of 1971 with our new MLAs. So many of them, especially the rural ones, brought up this topic of ECS, saying, "You've got to do something about this, Lou." Between the letters that Albertans sent to me on ECS and the influence of caucus, ECS became an important and successful policy of the government.

As Minister of Education, Hyndman "was frustrated with the pace at which things were going." As he looked back, he believed that the government had to move on ECS, the EOF, the LD program, and a host of other educational issues:

> I would drum this into Deputy Minister Earl Hawkesworth. These were complex things to do. . . . Many trustees said, "Let us do this our way. We don't want to have these special funding categories. They're complex, and we can't get much money for them."

By the time that Hyndman's four years as Minister of Education ended, he was frustrated that the Department had not been able to do more. However, he said, "In looking back it appeared we'd at least got a number of things started that improved fiscal equity and inequities for students."

Hyndman was "pleased that the government, during his time in Cabinet, was able to give some greater credibility to special education, which previously had been to some degree left off in the corner." This included the preparation of teachers for special education. The importance of programming and teaching from kindergarten through Grade 6 needed to be recognized and emphasized. This was a general theme for the PC caucus prior to 1971 as the Official Opposition and then from the 1971 election until 1975. During Hyndman's time as minister, he believed that the elementary grades are crucial years in a child's development. This was brought home to him by his contact with teachers and was one of the reasons that the government introduced many programs to strengthen elementary education:

> That message was delivered to me when I talked individually one-on-one to many teachers all over the province. Elementary teachers said, "You know that we're the back end of the caboose on the train. Nobody, whether they're in junior high or high school or in university or any of those, considers that we really have much importance. We believe that elementary is the foundation of the rest of the system. So try to improve this profile of nonvisibility of elementary education."

Although the division of the Department of Education into two portfolios, Education and Advanced Education, was not a deliberate move to improve equity in education, Hyndman stressed that the move doubled the importance of education representation in caucus, at the Cabinet table, and it allowed him twice as much time to focus on kindergarten to Grade 12 education. In his evaluation, "It assisted and made education more important and made the attempts at reform and change in education that much easier." In terms of the combining of the two ministries in 1999, Hyndman said that he could make a good argument for dividing the one department into two ministries given that the system, in his opinion, is so incredibly complex today that it is difficult for one minister to "get his hands around these huge issues of relationships with teachers, parents, school boards, colleges, and universities." In Hyndman's view, one minister cannot effectively handle both levels of education.

The reason for changing the funding formula from CRUs to individual students, Hyndman recalled,

> was partly to send a signal that while some standardized approaches are necessary in order to run a huge school system, there had to be a way of reflecting the fact that each student had a different background and different sociological pressures over the course of birth to age six.

Hyndman felt that it was the time to be more creative and consider ways to improve the delivery of education to all students, albeit at greater cost, especially for those with special or exceptional needs, and to make sure that the service was of a consistently good quality and that it did not matter where the student lived in Alberta. He emphasized that this included "especially bright kids as well as students in special needs," and concluded:

> We had to start doing that. I thought that the way, the lever, to do that had to be for the classroom unit to be downplayed and the per-pupil grant to be enhanced. All sorts of debates ensued on how it was impossible to make this shift.

It was a way for the Department to deliver a better educational system that addressed the individual student, in Hyndman's opinion.

On the topic of introducing new grants that may have affected equal opportunity, Hyndman discussed the Declining Enrolment Grant. Based on the Department's demographic studies, he said, the Department recognized that during the school year some school boards experienced a drop in school population. However, the cost to the school board remained the same, and it faced a tough financial situation with the prospect of teachers carrying a heavier teaching load because of a loss in funding when the Socred government implemented the CRU:

> If there was a classroom unit of 13 in Cayley or South Lloydminster, and one year the classroom dropped to 12 students, all of a sudden all sorts of funding problems [would arise]. That school board could then be faced with a tough situation. Teachers had to teach many more different courses. You couldn't stop it. At least that is what the demographics showed. So that was another issue that pushed the people to talk about the need for a special grant to assist those school boards facing this challenge. Another grant that assisted school boards facing this challenge that helped deliver an equal opportunity for students was the Small School Grant introduced in 1973.

Research was an important factor in Hyndman's decisions on the delivery of funding to school boards. "Dr. Duke directed that research," Hyndman recalled. "It allowed the Department to get some better measures of accountability and to measure vis-à-vis different parts of the province and how comparative dollars would be effective for one school board but not effective in another." In the beginning of Hyndman's tenure as Minister, there was very little information to make these comparisons. Five years elapsed from the time that this type of research was initiated until Minister Julian Koziak took hold of that kind of information. By 1974 and 1975 the information that the Department was receiving from the public showed "a higher degree of knowledge and appreciation by the citizens of the fact that we were doing some things to help in special education. We knew this because they started flooding the Department with requests for funding special education." Hyndman recalled being "very frustrated with the Provincial Treasurer of the day [and telling him] that special education funding was needed; it was vitally important, and this had to be a priority." Without the funding, Hyndman told the Treasurer that "he had passed cutting into the muscle and was into the bone." This all happened during the days when asking for 13% to 15% increases in funding was not unusual. Hyndman recalled that

> giving the Department of Education only 8% was not enough because the demand for special-need programming was doubling. [The Provincial Treasurer's] reply was, "Sorry, you'll have to manage with that." Every minister goes through that ritual with Treasury. We built up a high demand and interest in the whole special education area; it was hard to meet the demands.

With respect to the current funding arrangements in relation to achieving equity, Hyndman reported that "the results have been positive if uneven." He believed that "fiscal equity tools are blunt instruments, but a large part of the exercise [in 1993 and 1994] was to sensitize the citizens, taxpayers, parents, teachers, school trustees, and general population to that fact in some areas." In a few areas, he contended, it was necessary for the government to step in and start or "spark-plug" an initiative. Hyndman recalled that when he was Minister of Education, the initiatives to improve education worked. He cited the Learning Disability Fund (LDF) as a success because it sensitized Albertans to an educational need:

> I think nowadays there is a thoughtful understanding as to what learning disabilities are and are not. This is in the mainstream and is being addressed, as is ECS programming and initiatives to strengthen elementary education. At any rate, progress is mixed on the current funding arrangements, but I think it's been worthwhile for the system. The moves in terms of fiscal equity (and because of debt reduction) helped the majority of taxpayer support for the system—even with a growth in private schools. The Alberta public system achieves a high credibility and has a very good reputation in Canada. This system is not going to go away as is happening in the United States, where private education is very popular.

Hyndman believed that Alberta's public education system would "remain strong and vigorous because of that funding formula."

Hyndman opined that achieving equity is

> almost a thing dependent on the time and place. What was equity in the time of the Roman Empire, the Egyptian Empire, the Middle Ages, 1935, or what will be in 2090 are all going to be a little different; but equity basically has to do with the fundamentals of fairness.

The interview extended beyond the hour scheduled for it. Hyndman was encouraging and interested in the outcome of the research.

Julian Koziak, QC: Minister of Education (1975-1979)

I interviewed Julian Koziak, QC, on December 17, 2003, at 2:00 p.m. for less than one hour at the Hotel Chateau Louise. Initially, he was reluctant because he believed that he would not remember events that had occurred while he was Minister of Education almost 30 years earlier. As the interview progressed, he recalled his ministerial decisions, which proved valuable to the study. Nonetheless, he encouraged me to refer to *Hansard* and Department documents for the details of his decisions on the topics of fiscal equity and equal opportunity.

Koziak was elected to the Legislative Assembly of Alberta in 1971 as a PC. Following the 1975 provincial election, he was appointed Minister of Education, a portfolio that he held until the 1979 provincial election. Subsequently, he served as Minister of Consumer and Corporate Affairs in 1979 and Minister of Municipal Affairs in 1982. He then lost his seat in the 1986 provincial general election (Normandin, 1983, p. 692).

In discharging his duties as Cabinet Minister, Koziak recalled, in order to deal with issues it was essential that he listen "to all the people that were rightfully entitled to be heard, . . . including the members of the Legislature caucus, Cabinet, various interest groups, teachers, school trustees, the parents, and the children." He added:

> Nobody sits down at the beginning of a term and says, "Let's define fiscal equality or equity in education." That doesn't happen. . . . But in many cases what happens is, there are issues that are brought to your attention that require direction, and so you respond to them.

When asked who influenced his decisions, Koziak recalled that Peter Lougheed expected his Cabinet colleagues to recognize that the caucus plays an important role in government. "Ministers who did not listen to the members of the Legislature did so at their peril," Koziak recalled.

> This meant that there was a team effort. The fact that certain people were in Cabinet and certain people weren't in Cabinet did not mean that the people who were MLAs that weren't Cabinet ministers couldn't get their point of view across and could not get issues addressed. So what you would do is address these issues. Quite frankly, we had the money to be able to do things that some governments couldn't, and so you could say, "Well, let's see if we can help you out."

In addition to the influence of the caucus, Koziak acknowledged that within the Department the excellent administration included Dr. Hawkesworth, Dr. Hrabi, and Dr. Odenack, each of whom brought a different skill set to the discussions. These three were educators and leaders who had strong feelings for education. Koziak reported that they expressed views well and combined abilities, which he recalled as

> huge, along with the influence of the Alberta Teachers' Association, the School Trustees' Association, and other organizations representing the disabled and others, coupled with representations that were made by Members of the Legislative Assembly, which helped to develop effective government policy.

With respect to his role as Minister of Education, Koziak believed that it was "to do my best for my client. Coming from the legal profession, I understood that you do your best for your client." That defined role was the same role that he saw for himself as MLA, that of representing his clients, his constituents.

Koziak recalled his tenure as MLA and Cabinet minister:

> You've got to remember that when we were talking about the '70's it was the golden era of Alberta. There were natural resource revenues that were climbing very significantly from sort of a plateau that had been established before the royalty regime was changed. As a result of that, significant funds were coming into the treasury. The Alberta government had the ability to make adjustments that dealt with the issue of fiscal equity in education without having to take from somebody else to get it. So what we were able to do was add on funded programs rather than redistribute funds.

The extra revenue helped the government to respond and fund the needs that Albertans brought to its attention. An example of such funds was "the change in level of funding with respect to the elementary, junior and senior high school." More funding was made available for elementary students than for secondary students. Although some would have seen this as a move towards more equality of opportunity between the grade levels, Koziak explained that the expenditure of the funds to educate students was the local school boards'. Before the early 1970s, Koziak explained, teachers did not require a four-year university degree to become certificated to teach. Teachers with four years of university typically taught in high school, whereas those with one or two years of education taught elementary grades. When the Department made a four-year bachelor degree mandatory for new teachers, including those who taught elementary, the cost to school boards increased because elementary teachers were then paid higher salaries because of their degrees. With costs increasing, it was incumbent on the government to increase funding, which it did according to the elementary student count. It was reported that this was a move to improve the equality of opportunity for elementary students, but it was more a result of increased costs.

Koziak spoke of the specialized programs in institutions other than local schools, for which the government held direct responsibility. He recalled, "We had responsibilities for the School for the Deaf directly, and in the course of Cabinet tours we would be exposed to attempts by individuals to assist those that were developmentally challenged." The institutions that worked with these students had the government's empathy, which extended to the parents of the students. Koziak often heard representations from the Winifred Stewart and Evelyn Unger Schools, for example, requesting increased resources. He recalled, "We found ourselves in government facing situations that when a government does have the money, then you do reach out to those that were the poorest amongst us and then respond to their needs."

In Koziak's understanding, equal educational opportunity, or *equity* as he called it, occurs when students who have special learning or physical needs receive more funding to address the demand for more costly programming than do those in the regular education program. However, he recalled:

> What happened was, I did not sit down Monday morning and take out a statement about equality or equity. Those weren't the agenda items. The things that happened were as a result of responding to the representations that were made. There wasn't an agenda item at the outset developed from a script on equity.

The agenda items that might have equity, Koziak emphasized, were a result of input from Albertans and not a result of other influence from outside the province. He said:

> An MLA is the vacuum cleaner sucking up all these ideas from their constituents. There is no flame of fire that descends upon you when you're first elected and that imparts you with knowledge. That doesn't happen. The only way you're going to gain that is in your constant discussions with your constituents and the people that you interact with in government.

Constituents generated agenda items, which in turn were discussed and often turned into the actions that he took as Minister of Education. Koziak was clear that he did not recall

> ever having any reliance on the American educational system. As a matter of fact, maybe this is just something I dreamt, but I sort of have the feeling that our administration wasn't overly impressed with the American system of education. In other words, maybe it was a superiority complex, but I think that the administration that we enjoyed felt very comfortable with the quality of the educational administration system of this province and the delivery of it.

Koziak concluded his interview with, "Basically, I had very good, qualified, and dedicated people that I worked with in that period of time. What might have made the job much more difficult was easier because of them."

David King: Minister of Education (1979-1986)

The interview with David King took place during the 2003 Annual Representative Assembly of the ATA on May 17, 2003, at 3:00 p.m. Attendance at this event and those of other educational organizations allowed King to maintain contact because of his belief that it is necessary to keep in touch with as many perspectives on the Department as possible. At the time of the interview, King held the position of Executive Director of the Public School Boards Association of Alberta.

King was elected to the Legislative Assembly of Alberta in 1971. After the 1979 provincial election he was appointed Minister of Education, a portfolio that he held for two consecutive terms until just before the 1986 provincial election (Normandin, 1983). He was not reelected in 1986.

King was a willing participant in the interview and freely gave information as well as his opinion and philosophy regarding education in the Province of Alberta. He proceeded without notes and did not express a wish to refer to any government documents that would have been made available to him. Instead, he relied on his own recollection of events and perspectives from the time that he was Minister of Education until the time of the interview.

The definitions of fiscal equality, King said, were informal and ad hoc during the time that he was minister. The discussion was never about fiscal equality because "it was never about jurisdictions having the same number of dollars per pupil." Instead the discussions were "always couched in terms of funding unequally but appropriately in order to provide comparable opportunity for boards to work with students no matter where the student was and no matter what was the condition of the student."

King's perspective appeared to be more on how funding achieved equity (equal educational opportunity) for the student rather than how the revenue (fiscal equality) was gathered. He explained that the SFPF inherited from the Socred government was backed by 130 years of history. This all came to bear on the question of equity for the PC government. King recalled:

> We were really imbued with the idea that there should be equitable opportunity across the province, and special education was probably the first cluster of issues that demonstrated to us that equitable opportunity was not just a matter of the geographic circumstances of the board or the tax circumstances of the board, but that you had to look past the system into the lives of the kids and the parents.

Later in the interview King said that the government always focused on equity and always made changes to the funding of education to improve equity, not to improve equality.

From the beginning of the interview King's focus was on the individual student and how resources arrived in the school to provide an opportunity for the student to learn. The first big issue brought to King shortly after his appointment as Minister of Education was the Carriere court decision out of the Lamont School Division. He said that he knew as a layperson that up until the late 1970s children with severe learning disabilities often did not attend school, and if they did, they sat at the back of the room. However, as a result of the Carriere court decision,

> the message that was being brought to the government was, "You do things to provide substantial learning developmental opportunities for these kids whether they are blind, or deaf, or medically fragile, or developmentally delayed or whatever else." In that case, equity was a matter of insuring that the 13-year-old child in Lamont or the 13-year-old child in Sexsmith would really have the resources in place, in that school, to absorb as much education as could possibly be offered.

I continued to ask King about the Carriere case. As a new minister, he was called upon by the County of Lamont school board to provide the resources to address the court decision. King's recollection of the Carriere case was that

> Mrs. Carriere really tried to deal with these issues through the local board. She didn't get satisfaction from the local board, which was poor and would be reallocating resources away from other needs. There weren't any systems in place that provided Mrs. Carriere an opportunity to go beyond the local board to the government; that is, to the minister. There weren't any discretionary programs in place. So she sued the board for specific performance. I became minister at the point where she had been successful in law, and the board was then coming to the Department saying, "We've been told in court that we have to provide specific performance. We don't have the financial resources. We don't have the staff resources, et cetera. We're calling on you, the government." That was the point at which the government had to start to invent ways of helping boards to deal with special-needs students in the classroom.

Lougheed's PC government had an attitude and approach, King said, "that . . . wanted to listen to people, that . . . wanted to understand what people aspired to, and then . . . wanted to help make that happen." The Carriere case may not have happened, in King's estimation, had the government had more time or moved earlier to reach that point in responding to such queries from parents who were asking that their special-needs child attend regular classrooms for their education. King believed that if Mrs. Carriere had had a method of approaching the Department for help, the government would have resolved the case, and it would not have gone to court.

King addressed per-pupil funding early in his tenure as Minister. This was a formula that Hyndman introduced in 1973. He discussed the classroom-unit (CRU) funding of the Socred government: "With the benefit of hindsight, we may have lost something by moving away from the classroom unit, but we didn't know it as it was happening." He believed that the CRU was an equitable system to deliver funding to school boards; however, its particular form created an inequity for funding small schools, which the PC government tried to resolve with per-pupil funding. Nevertheless, it still had to introduce a small school system grant in 1973 and a small school grant in 1974. This move from CRU to per-student funding clearly, to King's mind, did not promote equity; instead, it was an easier method of funding and allowed the funding to follow the student. When it did so, students were allowed to choose where they attended school, which potentially could cause the local community to suffer a loss.

To correct or offset the move to per-pupil funding, King recalled that funds had been introduced for targeted programs. He recalled that ESL, sparsity and distance, and the Program Unit Fund were amongst these, as well as

> the Capital Building Program and BQRP, because we realized in the years following the '72 decision that the per-pupil grant, if it was simply equal for every pupil, was not appropriate to either the circumstances of the student or the circumstances of the jurisdiction. Some of the targeted funds followed the program funds that were meant to be a complement to and very much in the shadow of the per pupil fund. Over time, the variety of program funds and the amount that goes into program funds grew and grew and grew to the point that what was intended to be complementary really became a central driver of the whole system.

Both governments (Socred, pre-1971, and PC, post-1971), King believed, wanted to accomplish the same three things. First, they wanted to provide fiscal equity without further consolidations of school jurisdictions. Second, the PCs wanted to retain some effort on the part of the local taxpayer. King said,

> "[We] wanted to maintain the local property tax base as a way of letting the people in the community show themselves and everybody else how committed they were to education. At the same time, we didn't want local conditions or relative poverty to be a [hindrance] to an excellent education." [Linda, I indented this as it is 50 words long]

Third, the Department's goal was to avoid centralized decision making; rather, local school districts were allowed autonomy and the ability to make decisions locally. In conclusion, King recalled that these were interrelated; and, "given that those [were] three preconditions of any development for modification of the system, it was not unreasonable . . . to shift from the classroom-based grant to the student-based grant."

I asked King about the Education North project that had begun under his ministry: "Was that a question of equity, or was that a question of empowering people in the northern communities, or was it both?" He replied:

> It was both. I was just about to say it was equity, but equity is also a matter of empowering. Education North emerged at the same time that I removed the board of the Northland School Division (which was an appointed board). We rewrote the *Northland School Division Act* to provide for the election of trustees [in the] school division. It was always our view that you had to create the means for democratic action by people, including the people who lived in isolated communities. And then it was our view that you had to demonstrate to them that education was every bit as important for them and for their community as it was for any other community in the province.

He went on to recall that there were real benefits from Education North; specifically, curriculum development and specialized resources to address the uniqueness of the Northland School Division. Much of this revolved around the culture of the communities that the school division served. Giving this attention to the school division improved the opportunities for education, a form of equity, in King's estimation:

> Education North was intended to be an affirmation that the education of kids in those communities was right up there on the radar screen of the government in the same way as was education in Calgary or Edmonton. Now, Education North had its analogs in Calgary Plains Indian Cultural Survival School and in Edmonton. . . . It had its analogs in the urban settlements. It had its analogs on the reserves in southern Alberta.

With regard to this statement, King reiterated a previous statement about the government's attitude toward achieving aspirations: "The basic outlook of the government through this period was that we would listen to people and support the aspirations of people locally rather than make decisions centrally and generalize them, universalize them, or prescribe them for communities."

King commented on the Klein PCs' direction on equity while Jim Dinning was Minister of Education. He believed that Dinning's concern was that there was a lack of fiscal equity and the government needed to repair it and

> the fiscal equity 'vision' was coming apart at the seams, and . . . he had to find an alternative. His challenge to the ASBA . . . in 1991 . . . [was], they had to agree on fixes for the fiscal equity program. When they [the ASBA] went through an agonizing process and eventually agreed on a solution, Jim said, "What you've agreed on isn't good enough. So even though you have agreed, I am going to tell you what we are going to do." But apart from the specifics, I would say that you see in '89, '90, '91 lots of evidence that the government had decided that it was going to manage a more centralized system, it was going to professionalize it, by which I mean, particularly, that they were going to marginalize the role of trustees and [take] political control.

The result was the 1994 decision to regionalize and amalgamate school jurisdictions and eliminate the power of school boards to levy supplementary requisitions. King saw this as "a mistake in my view; and secondly, the decision to regionalize was in fact a decision to decouple education from its community relationship." In the context of his comments, King recalled that following 1994 he gave up his membership in the PC party because of his conviction that the three goals that the Lougheed PCs had valued, which he had addressed earlier, were being lost. Further,

> the caucus and perhaps the whole of the party had turned its back on certain political values and practices that I was absolutely convinced were an integral part of what we had been doing from 1967 when we were first in our position having sitting MLAs in the Alberta Legislature, through all the time I was an MLA, until 1992.

King saw "a tendency since the late '80's or the early '90's to favour centralization." He believed that the Alberta government in 2003 supported "a minimalist role for government" rather than adopting the previous values of the government, which held that it has a role as activist, and doing things that people wanted to have done and which realistically only government can do effectively, one of which was improving equity in education.

When Dr. Hawkesworth retired from the position of Deputy Minister, Dr. Reno Bosetti succeeded him. He had been selected by King, who "wanted to shake things up a bit." The MFP was one of the programs that Bosetti introduced and promoted; it was "very much his brainchild." King recalled, "There were two things that Bosetti talked about a lot that I approved of, and they were equity and accountability." The third thing that King valued and hoped to accomplish but never did was

> to describe the program and types of opportunities that we thought should be available to every student, no matter where they lived in the province. I really wanted us to say to boards, "This is what we the province want; this is what we are paying for. We give you the money and you do the very best you can with this to accomplish this program. Boards should also be in a position, have the capacity, and provide other elements important to the local community.

King saw the time that students spent riding the bus as an issue of equity. He believed that students should not have to ride the bus more than a set number of minutes per day. Whatever the time was, he contended, should be defensible and seen by the public as reasonable. In the same vein, King argued, "There should be no more than 14 kids in a K to 3 class." The MFP was a vehicle to accomplish such goals on bussing and class sizes for primary grades. He said, "I saw MFP as being halfway or two thirds of the way there. I really thought that we would carry on with the development of a description." King believed that it is necessary to set out expectations for school boards so that they know what they have to accomplish. However worthy, this never happened under the MFP, in King's view. He concluded:

> I thought the expectations would come with MFP. I'm just as surprised today that we still have diploma exams as I am surprised that 20 years later we have never come to grips with this question of what it is that we say we want every child to have access to, whether they live in Edmonton or in Fort Chip.

King said later, "It's back to the old saying: If you don't know where you're going, any route will do. If you don't know what you want, any amount is adequate." When I commented, "If you don't define the program, you cannot define the vehicle, whatever it is that you want to make. How on earth do you know how you're going to do anything equitably?" King replied:

> It seems to me, that's what the problem is. I started by saying that as a politician, that as a neophyte, I didn't understand the content of some of these words or ideas in April or May of 1979. I would say, with respect, that we still do not really know what we mean by the term *equity* because we have never addressed the question of what it is that we believed should be available to a Grade 3 child no matter where they live, or a Grade 9 child.

I asked, "How do you know if you're adequately funding something when you aren't sure what you want in High Prairie or Manyberries?" I also wondered how it affects equity. King reported that, instead of dealing with the issue provincially, the government responded to the "squeaky wheels." As a result, the question and the problem had never been dealt with, and inequity continues because it had not been established what was expected of the educational program in the first place.

In order to achieve equity within the educational system, King believed, the people leading the department, other than the minister, need to have training and experience in the system before they come to the department. Without this knowledge base the leadership is not credible; neither can a policy or direction of the department be properly evaluated as to whether or not it is equitable. King was critical of the current government direction in which people in leadership (i.e., the deputy minister position) do not have the background to make the necessary decisions on equity, whether it is in the field of education or health.

Throughout the interview, when I asked what and who influenced the decisions of the government related to equity, King emphasized the need for politicians, particularly Ministers of the Crown, to get out and meet the public and the leaders at other levels of government. He also spoke about the need to listen to interest groups in any given area of influence. This is something in which he prided himself; he recalled times that he had visited the Annual Representative Assembly (ARA) of the ATA or when he went to ASTA's annual meetings. He recalled that

> I was a person who would try to get out to every conference, not just to make an appearance, but for the duration including the hospitality suites. I came to an ATA meeting, and I can remember sitting on the floor with Bernie Keeler until about 2:30 in the morning arguing about this or that. The same was true when I went to ASBA or to CASS or to ASBOA, and there was in that day a very rich network that was very informal but nevertheless very, very powerful.

He contended that today this networking through listening is one of the factors that is sadly lacking the factor of getting into the middle of the debate with the public. At the time of the interview King was attending the ARA of the ATA in 2003. He said:

> As a community, one of the things that we are starving for right now is some of that. It's not to take a shot, but I just believe profoundly that the Minister of Learning should be here this weekend and that he should be in the hospitality suite at 11:30 tonight, and it's got nothing to do with party label or the individual. The community is just missing that.

The events that led to the amalgamation of school boards and the government's centralization of taxation power prompted King to characterize these events as being like a four-car accident at an intersection. He saw that there were "no one really triumphed. Part of the wreckage indicates that many different educational or administrative philosophies collided at high speed." There were other ways to solve the problem of the inequity of revenue from one school board to another. King speculated that

> the province could probably have solved about 70% of its nominal fiscal equity problems just by regionalization. You could take 129 students who got a supplementary requisition per student at $22,000, and you roll them into an adjoining rural division that is not nearly that well off. You would have eliminated this high peak that was everybody's target when they were complaining about the inequities in the system. It would be really interesting to do a study of what the supplementary requisition per pupil would have been post-regionalization if they had not done away with the supplementary requisition.

Although King saw equity as important, he believed that at least two other fundamental ideas that are even more important—respect, and nurturing within the community—are more important because they allow individuals to make mistakes and learn from them. However, he went on to speak about equity:

> Politics, democracy is about messy questions, messy outcomes. It is about subjectivity. It is about people having different values in a situation. So we can not say that equity is the only measure in this situation, because the situation is a political situation in which it is absolutely vital that we endorse certain other values just as much as equity, maybe more than equity.

As the interview drew to a close, King commented on the changes that the current government had implemented and the effects of those changes up to the time of the interview:

> I think that '92-'93-'94 represents a profound change in the world view of the government. I am not a theologian, but I really think that the government switched something off and switched something on sometime around '93, '94. I think that they are very fatalistic or deterministic. I think they really believe that there should be as little government as possible. I don't think that we should focus on whether there is little or much. I think we should ensure that, however much or little government we choose, it is responsive to the needs of people, virtuous, and the best it can be.

He added that the government believes that it should "get out of the way of the market in the delivery of health care, and if you leave the market alone, eventually whatever it is you get will be what you should have." However, he saw this attitude as inappropriate. Government needs to be involved and garner support and operate by fostering trust in the community it serves. This does not mean a minimalist approach to governing; instead, the government should become more involved by listening and responding to what the community says.

King was very ready and open in the interview. Although the questions were before him and I made no attempt to focus on the eight questions, King answered them but more often talked about his experience on related topics. He continually spoke of his beliefs and evaluation of what had happened and what is happening. He showed himself to be a populist, someone who is genuinely interested in hearing all sides of the argument and allowing all sides to be heard on any given issue.

Nancy Betkowski: Minister of Education (1986-1989)

The interview with Nancy Betkowski took place on February 18, 2004, at 2:00 p.m. at Barnett House, the ATA headquarters in Edmonton, Alberta. Immediately upon meeting me at the reception desk, she began to address the questions in the interview guide that I had provided and the government documents that I had given her prior to the interview date. She was enthusiastic about the topic of education and equity. As the interview progressed, Betkowski maintained that attitude and shared her experience and philosophy openly.

Betkowski was first elected as a MLA of Alberta from the Edmonton Glenora Constituency in 1986 and reelected in 1989. She was appointed to the Don Getty PC Cabinet and held the post of Minister of Education from 1986 to 1989. Following the 1989 election, she was appointed Minister of Health and served in that portfolio from 1988 to 1992. After her unsuccessful bid to become the leader of the PC party in 1992, she left provincial politics until her election as Alberta Liberal Leader in April 1998. Betkowski was reelected as MLA in a by-election in June 1998 and served as Leader of the Official Opposition until the spring of 2001 when she was defeated in the Alberta general election (O'Handley, 2001).

At the beginning of the interview Betkowski spoke about the right of all students to have access to education. She addressed this theme throughout her interview, particularly when she talked about the late-1980s revision of the School Act. Access, she believed, is a fundamental element to equal educational opportunity, or equity for students, as she called it. When I asked her about the fundamental principle that she followed, she recalled,

> I would say the right of access to education. Is it right to education, right of access? It's somewhat semantics, . . . because equity is financial, is educational, it is language, it is integration, it is corporate tax base, it is everything. Not all children have the same ability to learn the same material, but what I believe is every child's right is to grow and to be nurtured in that growth by the society that's supposed to be responsible for it. That's what I would say would be the equity issue.

Her view of this topic was defined within her role as Minister of Education. She recalled that she had been "very much aware that I was doing this on behalf of the kids in the province." Her responses to issues of educating handicapped students and giving them access to Alberta schools often came from her own role as a mother. As she developed and guided major revisions to the School Act through the Alberta Legislature, her goal was that "everything in education was going to serve the needs of that student." As a result, the School Act was reviewed through her concept of a wheel, with the student at the centre.

Education, to Betkowski's mind, is the most important function of government. She said:

> When I was there at 12 o'clock at night signing letters or doing whatever I was doing and my 18-month old baby was home, I would think the reason I'm doing this is because I want to make sure that these kids have an education, because to me it is the most important role and responsibility of the government. . . . Even having served as Health Minister, I know health's important, but education is number one.

The education portfolio for Betkowski fit her thinking, her values, her purpose, and her philosophy as she worked in government:

> So where did the philosophy come from? It certainly came from understanding the responsibility of a minister of education, a minister of the Crown. I think it came from my family. I think it came from being a mother. It all just kind of felt very right to be doing it.

Betkowski credited her discussions with Dr. Reno Bosetti for helping her to define equity in its relationship to equality: "We would always have these discussions about what's equality, what's equity, and the words get quite muddled. To me equality is sameness. Equity is respecting differences and trying to compensate for differences with a goal of being more equitable." When I asked her whether the definitions of fiscal equality and equity changed during her administration, Betkowski replied, "I think we understood equity better. I think we built a definition of it, and we tried to match the legislative framework with . . . the financial framework and even the educational framework." Betkowski felt that she had to consider equity in every aspect of providing every student with the opportunity for an education, whether it was in collecting revenue for public education, the legislative structure, the funding mechanisms, or the actual delivery of the education to the individual student.

Betkowski told a story about an event that "broke the camel's back" regarding her view of special-needs students. During the time that she travelled across the province with her Department's officials to discuss the revisions to the School Act, she met a group of about 30 Calgary mothers with no one from her Department in the room, which was unusual; however, it was a condition of the parents.

> They were nice-looking women from Calgary and all that, and they were all mothers of children who would probably fall into this noneducable category. The woman that was the spokesman said, "I need to talk to you about this whole concept," and she said in essence, "When that baby was born I knew that he wasn't normal. I have been fighting for six years of his life to get him a little extra something here, a little early intervention there, whatever it was at the time that was available. . . . My only light at the end of the tunnel is the school system that's going to take my child and work with him as a six-year-old like it says it's going to do with six-year-olds. And then I get to this term *noneducable* and think, That's what they're going to call my son, . . . and I'm not going to have anything.

Betkowski then understood that the term *noneducable* was harmful because of its suggestion that it went against equal opportunity for those children with special needs. She said, "You can't just write off a group of kids. So that was when we dropped the term, absolutely dropped the term and said, 'If there's a right of access to education, it's a right for every single child.'" She knew that with medical advances it meant that more of these children would be coming into the school system, and there was a responsibility on government and Albertans in general, to help the children grow.

During her tenure as Minister, Betkowski recalled, there were disparities between school districts' tax bases. Some districts had large corporate tax revenue, whereas others had little corporate tax revenue. At the same time as she was seeking revision to the School Act, Betkowski wanted to resolve the disparities by pooling the corporate tax base and sharing it with other school districts on an equitable basis. The concept received some support in the government caucus, but also quiet, but firm opposition. Betkowski promoted corporate pooling to the government caucus and was supported by caucus members such as Dick Johnston and Ken Kowalski, and "some pretty big players were very positive, but . . . MLAs representing the smaller, richer school districts . . . would have none of it, and they dubbed it communism and everything that you were doing, all this pooling of money." However, many of the advocates did not speak out because they were afraid of alienating the "nay-sayers" and the advocates needed support on other issues of the day. During the last two days before the caucus met on the amendments to the School Act, Getty told her, ""No more [changes]; we're going to do it." Betkowski went through the priorities for the last time:

> Corporate equity was high up on the priority list, but we also came to the conclusion that it was kind of a make-or-break deal for the *School Act* itself, that it could divide our caucus incredibly, and I wasn't willing to risk the whole School Act while I waited for the corporate pooling model.

Betkowski remembered walking into the caucus meeting having decided to pull corporate pooling from the bill, and she gambled that some of the advocates who had remained silent would speak up. They did. She recalled:

> It hit the fan. Kowalski started to yell at me, Dick Johnston started to yell at me, and I looked at them and I said, "Well, talk about it then, because I haven't heard you talk about it in this room." Anyway, it was a bit of a risky ploy, but as it turned out in the end, the decision was not to go with it and to keep what we had intact, recognizing that there was going to have to be a return to the issue. My plan was to get the composite done and then immediately launch a corporate pooling discussion. That was when I was pulled off the ministry.

The traditional conservatives in the PC party, Betkowski recalled, had difficulty in placing the "student at the centre of the wheel" because it was a move away from the old School Act that had given the parents' rights and responsibilities for students. This attitude of traditional conservatism showed up in another issue in which Betkowski and Elaine McCoy, Minister of Consumer and Corporate Affairs, advocated adopting the United Nation's resolution on the Convention on the Rights of the Child. Betkowski recalled the opposition of the traditional conservatives:

> You know of the UN resolution on the rights of the child. . . . But I was supporting it; so was Elaine McCoy, the UN Charter, and saying that Alberta should stand, Alberta was a hold-out from the rest of Canada, should be supporting it. But it was the same attitude that I hit in terms of putting the student in the centre of the legislative framework and the parents one layer out. And another minister looked at me when I said was advocating for this rights of the child. He said, "If I want to cuff my kid across the head, I'll do it, and no piece of UN crap is going to stop me." I should have walked out then, but I didn't. I tried to change him for another 20 years.

In the 1987-1988 year there were budget cuts to all government departments, and the Department faced cuts of 3%. However, special education and equity grant budget lines, as Betkowski recalled, increased. It was the issue of equity that prevailed. She knew that "poorer school boards would argue that they couldn't take the hit as much; a rich school board could take a much greater hit than a poor school board," but the argument for improving equity was what she wanted to expose. Betkowski recalled, "We didn't want school boards to respond by cutting out special ed programs, which would be an easy ride, or [the school board to] ship the kids out." A provincial general election was pending, and it was an uneasy time around the Legislature. Jim Horseman asked Betkowski for a meeting to discuss the 3% reduction in the education budget, and in the meeting he said:

> Well, basically, the fate of this government rests on you and Marvin Moore, and if you can do this 3% cut and let us get reelected, well, my hat goes off to you." I think it was the right thing to do in a sense, but it was very, very dicey.

Betkowski remembered being challenged by Premier Getty to reduce the provincial government's budget "when we hit the financial crunch in '92," a time that she served as Minister of Health. Her response to the Premier on health and education budgets, despite his insistence on reducing the grants, was, "We can't do it. We cannot do it again. We can hold the line. We can make it a 0% growth, but we can't cut again. It's just too destructive to the fabric."

Betkowski's evaluation of the changes to public education in the mid 1990s was as an outsider to the political process. Jonson's decisions affected equity in education, in Betkowski's opinion. She recalled that with Halvar Jonson as Ralph Klein's first Education Minister, the government

> tried to have it both ways. They were trying to use the political momentum to create a more equitable solution to funding and trying to mask the fact that they were basically trying to find a vehicle to cut funding. I think they put the two of them together quite masterfully in a sort of perverse kind of way, but that was my observation of exactly that, that it was just an excuse to cut funding. And I think it triggered a lot of the problems that have just sort of festered.

When I asked Betkowski about an apparent shift from rationalization to politicization in the government's approach to education during the 1990s, she commented that during this same time period when Jonson was Minister of Education, the government politicized the process that was used to arrive at resolving matters that touched public education. This included the subjects of fiscal equity and equity for students. Messages from the government put a favourable spin on the changes that it was seeking, primarily deficit and debt reduction. Rather than relying on and respecting the legislative process, the Klein government crafted communications directed at the public to reflect the government's desired position. The legislative process that Betkowski preferred was ignored, which she felt should have been "open debate, right? It's questioning. On the other hand, politicization is, This is the view, get on board the ship, and we're all heading out." Communications drove the change in 1994, in Betkowski's opinion, and the Klein government used communication to achieve its goals: "In corporate Alberta . . . they would say it's a good thing. The government is putting the responsibility back on the schools." What was lost in the government's communication was "the impact on the individual student." She believed that this had been done purposely, because

> there were lots of people that argued with me after these changes were made to education in the 1990s and said, "You can't educate every kid. You can't help every kid. It's a pipe dream." My response was always that that had to be what we're trying to do [in order to address equity for each student].

Funding public education was left to the communicators who, according to Betkowski, took over public policy making instead of leaving it to educators and the Department.

The interview closed with Betkowski's emphasis on the need for elected MLAs to represent and serve the people who elected them. She valued this attitude of service that she had found in a number of MLAs with whom she had worked, such as Peter Lougheed, Lou Hyndman, and Ray Speaker—people who valued the legislative process and valued the input from the electorate.

Jim Dinning: Minister of Education (1989-1992)

Jim Dinning was first elected to the Legislative Assembly of Alberta in 1986 in the constituency of Calgary-Shaw and then reelected in 1989 and 1993. He was appointed Minister of Community and Occupational Health on May 26, 1986, and Minister of Education on September 8, 1988; reappointed in April 1989; and became Provincial Treasurer and Minister for Consumer and Corporate Affairs on December 15, 1992 (O'Handley & Sutherland, 1997).

The interview with Jim Dinning was held on January 12, 2004, at 9:30 a.m. in the cafeteria in TranAlta's building at 110 - 12th Avenue SW, Calgary Alberta. During the first 10 minutes I introduced Dinning to the study and talked about the interviews already completed and those yet to be done. He seemed interested and enthusiastic about discussing education and the related topic of equity.

Dinning recalled being surprised when he became Minister of Education in September of 1988 after leaving the Department of Community and Occupational Health. Premier Don Getty had merged the old portfolio of Community and Occupational Health with Hospitals and Medical Care and placed Nancy Betkowski, the previous Minister of Education, in the amalgamated portfolio.

> I probably spent the first 12 to 16 months wanting everybody to love me, and then I thought, if I could bring peace, then everybody would just love me; then I'd be a good Minister of Education. Realizing that . . . love and respect are two different

> things, . . . at the end of that first 12 months I realized my kids weren't getting a better education because of anything that I was doing.

It was then, Dinning recalled, that he concluded that there were three or four key issues with which he had to deal. Two of these issues were "a stronger focus on results and student achievement, kids actually learning in school, learning the curriculum and knowing . . . where they were at. . . . So results were pretty important"

> [because there was] an increasing number of [special-needs] students in the system who clearly were going to be, or were being, left behind. . . . If that meant lifting up and supporting and providing services to [these] special-ed kids with varying needs, varying degrees of need, then damn it, we in Alberta should be able to do just that. In doing so, I was, and I remain to a large degree, a strong advocate of integration.

Dinning described the importance of integrating special-needs students into the regular classroom. He felt that as many special-needs students as possible should be integrated into the classroom, "and so in the end it was going to be better for all students if there was maximum integration to the point where it remained functional." However, to Dinning's mind it was important that we recognize when integration becomes dysfunctional, and "at that point, for everyone's sake, integration should stop."

Dinning quickly became aware of fiscal equity after he became Minister of Education. He learned that one mill of taxation in one district would not raise the same amount as it would in a wealthier district. This lack of equity was an issue that he sought to resolve in the latter part of his term. He recalled:

> It was either '91 or early '92 where I went out on a series of meetings around the province, went to the ASTA, went to the various school boards and districts, went to chambers of commerce, and went on the stump to sell the importance of fixing the equity problem, defining the problem, and coming back to them with a solution, and then getting their help in getting a solution. I remember I'd get into my full soapbox-pitch.

Some of the parties were willing to participate, others were neutral, and some were strong antagonists who said, "Our efforts are sort of a chipping away the independence of a school board." Unfortunately, the division was reflected within the government caucus. Dinning found himself portrayed as the victor and others as the villain. During the 1991 or 1992 PC annual convention, resolutions were put on the floor to deal with fiscal equity:

> And I think it was led by the Barrhead constituency as saying we should move towards the fiscal equity proposal or solution that the minister was proposing. And we worked the floor like hell, and we won it. It was sort of a 53/47 victory, very close, . . . only to arrive back in caucus and Cabinet to be told that "that wasn't a hill that we were going to die on, young man."

Dinning recalled that during his time as Minister of Education, "I would often say, 'A kid is a kid no matter where he lives, and . . . every child should have access to schooling that a school board or the government can finance in a manner that's the most equitable.'" In order to provide every student better access to programming, regardless of where the student lived, the Department officials

> really . . . turned the pressure on in the Barrhead Distance Learning Branch to make sure that if school boards didn't have the financial capacity to hire a teacher, then we were going to lift them up to be able to provide whether it was Spanish, or whether it was an economics course, or psychology, or a social studies, or a Mathematics 31 course; that if the folks in New Brigden didn't have access to a good Math 31 teacher, why should that kid, just because he lives in New Brigden, not have somewhat the same opportunity as those who go to Sir Winston Churchill High School?

Having the revenue to be able to pay for programs was another concern for Dinning. He recalled, "Paying for distance education was making sure that they [the students] received an equitable education through a fairer distribution of the dollars." This was an important funding issue that needed to be addressed. As a result, Dinning explained that a government fiscal equity grant was in place that was designed to assist with paying for distance education where it was most needed.

Equity was not what everyone in the province wanted, Dinning said; many people believed that students should be treated equally:

> Well, the problem was that nobody—at that time 500,000 students—were [coming] out in the starting blocks equally and that to achieve—ultimately, to be able to achieve equality, you've got to treat people equitably, which means treating some people unequally in order to achieve equity.

Where sparsity and distance needed to be overcome, or any other set of conditions that limited students' access to the same quality of programming as was available in the large urban school, then there had to be a way for the government to provide the 500,000 students equitable treatment.

Dinning credited the efforts of Dr. Reno Bosetti in addressing issues related to fiscal and student equity. He found Bosetti to not only very influential and effective as a deputy minister, but also effective as a mentor and a teacher to the Ministers of Education with whom he worked. Dinning said, "There were some school boards who saw my efforts, and even Nancy's and even some of Halvar's, as sort of being a pawn of Bosetti." Despite that, he added with laughter, "I soon got comfortable with the portfolio such that . . . when I was finished, absolutely everybody was unanimous. Everybody in the province was glad I was leaving; certainly the school trustees were."

When Dinning was appointed Provincial Treasurer he recalled, "Clearly I didn't lose my interest in the issue as soon as I had donned a new hat." He described the events that occurred and the rationale from 1992 to 1995. Premier Ralph Klein declared his objectives early in 1993, and Dinning remembered him saying, "We're going to balance the budget, we're going to stop deficit spending, we're going to begin to pay down the debt, and we're going to change the way that we do the business of government." The government's budget reduction from 1992 to 1997 amounted to 20%. The Provincial Treasury Department took a 69% reduction, whereas education, Dinning recalled, took only a 5% cut.

Education underwent changes that affected governance as well as fundamental shifts to revenue and funding regimens. These changes affected fiscal equity. "On the fiscal equity discussion," Dinning recalled that Jonson had said that if the government was going to "begin to fix" fiscal equity and reduce spending at the same time, then "we were going to have to do something more than just sort of tinkering around the edges." For Jonson that meant pooling more than the corporate tax revenues; it included residential property tax revenue as well. While pooling the tax revenue, Jonson reduced ECS funding.

Dinning spoke of discussions that led to the changes that began in 1994:

> There were a number of reforms that were sort of in the gestation phase, and the changes that occurred in '92-'3-'4 created the set of conditions into which you could launch and give birth to many of those ideas that were in the gestation period. . . . Jonson's support and my support [for the reforms we were seeking] didn't change, [and] by the time we got into '93-'94 we said, "Let's go for the full Monty and do the whole thing," and you can bring about greater equity by doing that.

Many of the initiatives that were launched, Dinning recalled, "did not live beyond a year or two or six months. ECS funding, for instance, the ministerial appointment of superintendents, those things fell away or were changed in time."

Dinning reported that although the government knew that the reforms that they were attempting during the mid 1990s "were not in the top 10 'in-favour list' of a lot of groups around the province," the government still went ahead with the reforms. Dinning remembered a broad-based silent majority that supported the government's reforms, including those in education:

> There were a lot of men and women around the province who would quietly, quietly come up to you and say, "You know, you're making some tough decisions, and I don't like one or two of them, but stay the course because overall you're doing the right thing."

Reforms were made quickly, which resulted in good economic conditions, and oil and gas royalty revenues improved. However, mistakes were made when some of the reforms were implemented, but Dinning said that the government moved with confidence and with a mind to repairing mistakes later. He likened the process to "taking a band-aid off a hairy arm":

> But if we'd done it one bit, one bite at a time, it's a bit like taking a band-aid off a hairy arm. If you take it off one hair at a time, there's a chance you won't take it off, and in fact, we had to do it. I always used to say, You can't cross a chasm in two small leaps. We knew we were going to make mistakes, and that's why the Premier was a master in saying, "You know, we're not going to blink; we're going to get there, we're going to zig and zag and go over and under and around where we need to, but we're going to get there." And getting there fast meant that we could go back in and correct some of the areas where we had been less than elegant in our efforts.

When I asked Dinning about improving efficiency within school jurisdictions, he lamented that "there'll never be enough money." With a limit to the revenue that government received, there was a limit to what the government could do during the mid-1990 reforms, as there always is. "So if you're going to have finite dollars and there's never going to be enough, make sure that the bucks you've got, you spend the smartest that you possibly can." When Dinning was appointed Minister of Education, he began "pushing for greater accountability and sort of greater transparency around schools, school boards, and school-based budgeting" to achieve improved efficiency. Another attempt to improve efficiency, he recalled, "was also in that we would reduce the number of jurisdictions. . . . We went from 125 school boards to 60."

Dinning addressed the current situation. He had already spoken about the changes that brought about corrections to the reforms of 1994 to 1996; however, he still saw the potential for adjustment today:

> If I had druthers, we would probably swing the pendulum back to corporate and industrial, particularly industrial pooling, and not do the full Monty, and leave local school boards to set the mill rate and raise taxes, raise revenues—raise the revenues, not the taxes—from the residential and small commercial tax base by itself. In many ways, the residential base is the source of the growth. It's where the pressure comes from to build new schools or hire more teachers to teach more students, and who knows that better? Frankly, not Edmonton, but Warner and Parkland and Calgary and the Grand Prairie Catholic School Board knows that better, frankly, than "the Dome" does.

Dinning believed that corporate pooling for education should remain in the government's plan for funding education: "Frankly, the oil sands in northeast Alberta is a wonderful accident of geology and geography, not because some brilliant person in Fort McMurray found it and single handed developed it." The corporate tax revenue that the oil sands generate belongs to all the students in Alberta, not just the students in Ft McMurray, according to Dinning. Despite this intent to share the tax wealth with Alberta, he said that "poor Fort McMurray needs to deal with the growth in population. My comment would be that they should decide on the basis of the residents there, how and how much they should be taxed" on their property, so that the school system can benefit from that local revenue.

The interview scheduled for 45 minutes—it extended beyond the allotted time. When Dinning's secretary called him to return to his office, he allowed me another 15 minutes. He added some closing comments, including praise for the work that Nancy Betkowski had done to shepherd the School Act revisions through the Legislature. This, he believed, helped to set the stage for achieving better levels of equity. Although he did not elaborate on how that was done, he did say that, having that out of the way, he was able to focus on the issues surrounding the inequities between school jurisdictions and other issues such as achieving better levels of accountability in the educational community.

Halvar Jonson: Minister of Education (1992-1996)

The interview with Halvar Jonson was held at the Alberta Legislature Building in his office on the afternoon of January 15, 2004, at 1:00 p.m. for about one hour. Jonson immediately began to answer the questions that I had provided him with earlier. Opening chitchat that often accompanied other interviews did not occur during this one because on an occasion a week earlier we had exchanged information about our respective families, who had known each other in other circumstances. I had discussed the possibility of an interview with him in 1997 when he and I attended an Annual Representative Assembly of the ATA as he concluded his tenure as Minister of Education. When I met him on later occasions, I reminded him of my wish to interview him; he continued to encourage me to contact him when the time was appropriate.

Jonson grew up in Boyle, Alberta, a small village about 150 kilometres northeast of Edmonton, the same area in which I had grown up. His family and mine visited back and forth over the years.

Jonson began teaching in 1963. He then became a principal in the County of Ponoka School Division; his last position had been principal of Ponoka Composite High School in Ponoka, Alberta. Prior to his election as a MLA in 1982, he served as President of the ATA. Throughout his time as MLA, until he became a Minister of the Crown, Jonson was involved in the Legislature's Education Committee. He was appointed chair of the committee for a number of years until his appointment as Minister of Education on December 15, 1992, a position that he held until June 1996. Subsequently, he was appointed to the portfolios of Health, Health and Wellness, the Environment, and, finally, International and Intergovernmental Affairs, an appointment that he held at the time of this interview (O'Handley, 2003).

Jonson began the interview with a review of the evolution of funding public education in Alberta. He explained that public education, at its inception in the province, was almost completely the domain of the hundreds of small school boards across the province. With the exception of setting such things as curriculum, programs, rules, and regulations, school boards were in control and took the majority of the responsibility for acquiring revenues for running schools from the local property taxpayer. Taxes were set and levied through the local municipalities, which collected the taxes set by the school board. From the time that the Province of Alberta was created, the government took more and more responsibility for funding local school boards to educate students in their jurisdictions. These changes occurred before Jonson was appointed Minister of Education. He recalled that the issues had been developing and evolving:

> While the government through its education . . . budget had an overall per-pupil grant, . . . they also had certain special grants for certain types of programming and . . . to a small degree recognized that there were certain programs which required additional funding. So in a sense, they were recognizing that there were additional burdens on the school system . . . in the funding of education.

Some school boards were able to respond to the increasing school-age population who were putting demands on the systems because of "fiscal ability or capacity," whereas others struggled. Jonson recalled that when he entered the Legislature:

> there was a tremendous difference in the ability, the fiscal ability or capacity, of the municipal districts which correspond . . . to the school jurisdictions to raise money. For instance, in one jurisdiction which might happen to be blessed with a great deal of oil activity, a mill on the tax base raised a very significant amount of money for education; whereas in another jurisdiction—and I could use the County of Athabasca or the County of Ponoka as examples—the worth of a mill was dramatically different. Where you didn't have an industrial base to tax, it fell upon the small business person and the householder. So the differences there were building, increasing, and they were quite dramatic.

Jonson observed the inequities and issues surrounding the funding of education at the local school board level when he was a teacher and principal before he entered provincial politics.

Jonson continued to talk about his experience as an MLA before his term in the Cabinet. He said that his experience on a number of aspects of public education over a number of years helped him to see and address issues such as funding inequity between school districts. The discrepancies among school districts were evident, and the issue was debated in the Legislative Assembly of Alberta. The government, in his recollection, attempted to mitigate the inequity problems through a variety of grant programs. However, the inequities continued and increased. Jonson cited a "classic example" in his own constituency: the County of Ponoka compared with the County of Lacombe. The County of Lacombe had a "very strong tax base" because of a major refinery, the Joffrey plant, within its boundaries, as well as other industrial developments. For the County of Ponoka, on the other hand, the industrial tax base "made their ability, per mill, to raise money for their education system markedly different on a per-pupil basis than in the County of Ponoka." Jonson knew that the government recognized these inequities to a modest degree, but there remained "a very, very significant difference." The Machinery and Equipment tax brought in extra revenue where there was industrial activity, which "made the difference even more dramatic." Marked differences in the tax base created a serious issue for taxpayers that needed to be solved. Jonson recalled:

> When Premier Klein took over as Premier, this was focused upon as an issue. It was brought up by people such as me. I wouldn't take the whole credit for it, but I certainly was one of them. We had to correct this situation.

There was a "sidebar which was important," Jonson remembered, that involved the school boards that did not have students but had taken in tax revenue for education. The taxpayers in the larger urban centres such as Edmonton or Calgary were not going to put up with this apparent inequity, as well as the inequity produced by some school jurisdictions having large industrial tax bases, whereas others did not. In his recollection, this had been the situation when he was appointed Minister of Education in 1992.

In the 1993 provincial general election, the governing PCs returned to power under the leadership of Premier Ralph Klein. One of his important campaign planks drove the government to make significant changes to balance the provincial budget. “Every part of government was examined, and that included education,” Jonson recalled. However, education was treated better than other departments. The target reduction for education was 5%. “Albeit there was still a growing student population, so it was a significant shift in the funding,” he said. All along, Jonson was determined to solve the equity problems that he had addressed throughout his time as an MLA:

> So there was a debate. . . . Although not directly related to the funding, but to show that we also felt that there had to be some efficiency, . . . we regionalized the school jurisdictions across the province. That is where we came to with respect to the changes. . . . It did work. . . . The efficiency . . . of the education system at that time improved significantly because we were serious. It was going to happen and it did happen, and we got everybody’s attention.

Jonson believed that the government achieved equity for taxpayers. Further to the equity and efficiency that he said had been achieved, each school board was given the ability in the School Act to go directly to the electorate through plebiscites for up to a 3% increase “in the money raised from their mill rate.” He acknowledged that there had been five attempts to do this, but none were successful.

When I asked Jonson what made this the right time to proceed with these changes to the governance of education and equity for taxpayers, he cited a combination of circumstances and events. He spoke to the government about running deficits year after year. None of the school boards or other local governments were as

> shaky in terms of their financing. . . . We were not too far away from the . . . National Energy Program and the blows that it dealt and so forth. Other provinces were in deficit positions. . . . It was starting to become something that people were concerned about. The federal government was in deficit. The key thing . . . was that Premier Klein and those of us that were part of his team in running for leadership said quite clearly, right from the start, “These are the goals that we have.” There was a list of them, . . . but this was a very important part of it, and that was fiscal responsibility: Balance the budget, reform and streamline the system.

Jonson saw it as a "hard battle, . . . but we ultimately had the support of the majority of Albertans. It took a while to convince them."

Jonson believed that in the changes that education was to experience in 1995 it was important that the student and the student's classroom were the least affected. An initiative that focused on students was "pressuring changes on school districts in the way that central offices worked." He added, "We might be losing ground on that now, but that's another story."

Measures had been taken to improve the equitable treatment of students, such as implementing distance learning for small schools, particularly small high schools. The application of technology Jonson saw as having great potential in resolving the inequities between the programs available in small rural schools compared to those in the large urban schools. With respect to special-needs students, he said that the government "paid quite a bit of attention by dealing with the specific costs of education" in areas where there were larger than average special-needs populations. Some areas required more support for transportation for these students. In the southeastern part of the province, population sparsity was a problem, and the government wanted to make sure that school systems could "operate on an equitable basis with respect to others." Regardless, Jonson opined that there is always an equity gap between Edmonton and rural Alberta.

The government was fairly "cautious and careful about adding additional programs and funding" after the changes in 1994 until about 1999, Jonson said. Since that time, he said, there had been "a great boom" in adding some specific funding, particularly in the special-needs area. He believed that as funding expanded and more funds were granted for specific areas, as he saw happening at the time of the interview, a bureaucracy and a complex paper trail would develop. Equity would not be improved, efficiency would decline, and the public would start to question the additional funding.

Measurement of the education system through the achievement testing program was altered in the 1990s at the Grades 3, 6, 9, and 12 levels to determine whether the education system was meeting its goals (i.e., its business plan). Jonson thought that the measurements have shown that the system has met the goals set out and that it "is performing more consistently than was the case before." The budgetary cuts, the move to improved fiscal equity, and the funding framework of 1994 did not cause the system to fail; rather, it has improved, in Jonson's opinion. He recalled, "Another part of the overall Klein revolution was that we said that we were going to measure performance. Today we look back and see that the system has thrived and performed as well as or better than planned for."

Jonson had some reservations about the Department's Learning Commission in the fall of 2003:

> Recommendations from the Learning Commission seem to be rolling, and they're going to be enhanced. I'm afraid if we do everything exactly as this last education commission has recommended—but I'm off topic—there is a danger of making the system too complex and maybe getting bogged down in trying to meet too many masters and too many expectations. . . . The overall problem with the changes in the mid 1990s was solved. Maybe we have some other problems in the education system now, but that's another part of the story. You've got reading, writing, arithmetic, and three or four other things, but that's the base.

Jonson was cautious about the expansion of funding levels because, if funding is tight, then the government has to ask whether it is being used effectively. For example, the question of effectiveness is a problem with special-needs funding and programming. The area of special-education needs

> is becoming a quagmire due to so much paperwork and administration time that it takes away from the time being spent teaching kids. The question is, at what point in time do you draw the line, particularly if we get into tight funding? How much do you invest in that program? It is very, very important, and one of the things that's so counterproductive in the system right now is the insistence upon on inclusion, and some people quietly ignore it. . . . The simplest thing is, if you've got 30 students in a classroom and 5 are having great difficulty, you take them out to another area to learn and address their specific problem.

Because of a decrease in efficiency and effectiveness, Jonson was not convinced that equity for these same students and the regular students was improving; instead, the funding was being absorbed by bureaucracy.

Jonson closed with, "I think the government has given priority to education and will need to continue to do so."

Gary Mar: Minister of Education (1996-1999)

Gary Mar, QC (BComm, LLB) was first elected as an MLA of Alberta for Calgary-Nose Creek in 1993. He was reelected in 1997 and 2001 and continued to serve as an MLA at the time of this writing. His first appointment was as Minister of Community Development and Minister of Culture and Multiculturalism. He followed Halvar Jonson as Minister of Education and served in that portfolio from June 1996 until May 24, 1999, when he was appointed Minister of Health and Wellness (O'Handley, 2003).

The interview was held in Mar's office in the Alberta Legislature Building on the afternoon of January 15, 2004, at 2:00 p.m. and was scheduled for 45 minutes; we held it to that time. Mar was a willing and congenial participant who declared that the issues that he faced today as Minister of Health and Wellness had distracted him from his term as Minister of Education, which caused him to have difficulty recalling events.

As the interview began, the question about the definition of equity was raised in relation to his tenure as Minister of Education. Mar said that he could not recall a definition. However, he began to describe the principles and issues that needed to be addressed when he entered the ministry. He recalled that when Jonson took over the ministry, "there were great discrepancies in funding levels in education" between school jurisdictions. The idea behind the reforms in 1994 was to try to bring the discrepancies together. As a result of the efforts of Jonson and the government, "there was a narrowing of the variation of funding levels, but there was still recognition that not every student could be funded the same way."

When I asked him about any accomplishments in improving equity, Mar cited the Early Literacy Program, which directed special funding towards schools where there was a need. He was "very strongly [supportive of] . . . early literacy." Since its implementation in certain schools, the program had become successful, and significant gains had been made in the number of students reading at grade level. I asked Mar what had precipitated such success, and he replied:

> It was the recognition [by government] that education is key to full participation in society. Confucius wrote, "If you want a more harmonious society, you must cultivate better individuals. The way you cultivate better individuals is through

> education." The process of education is to make people privately happy and publicly useful, and we do so by transferring from one generation to another, skills, knowledge, wisdom, values, character. All of those are important elements of a proper education, and full participation in society requires that people have skills of literacy, numeracy that are the skills that unlock the rest of education. Our future prosperity as a province is dependent upon the level of education of our society. . . . While what I do now is important [as Minister of Health and Wellness], it all stems back to ensuring that kids are properly educated [and] have a good start in life.

Mar responded to my question about what changes the taxpayer had experienced with regard to fiscal equity:

> If you ask me, Did those characteristics change over my tenure as an MLA? the answer is yes. But did they change during my tenure as Minister of Education? I would say that the answer is no. A dramatic change took place during Minister Jonson's time when the— . . . I don't recall what the expression was. It wasn't *corporate pooling*, but it was in essence the central collection of property taxes that supported education.

Mar evaluated this shift in collection of property taxes as one that created considerable angst, not only among Albertans, but also among MLAs. However, he recalled that "Minister Jonson did an exceptionally good job of sort of marshalling that change through, because it was by no means one that was agreed to by consensus." Despite the challenges and anxiety, Jonson did the right thing even though in some circles it was not popular. Mar quoted Gustav Mahler, the composer,

> [who] said that the point is to go through one's life unerringly doing the right thing, guided not by the beacon of public opinion but by doing what is right, being neither seduced by a cause nor disappointed by failure. We did the full Monty—

the title of a popular movie in the mid 1990s, which can be taken to mean that the government did everything that it wanted to do and did not flinch, despite detractors.

Everyone acknowledged that there were discrepancies in the amount of revenue available per capita for public education, Mar recalled; however, there was no consensus on how the problem should have been solved back in the early 1990s. Minister Jonson and the Provincial Treasurer, Jim Dinning, "took the bull by the horns" and went forward to pool the revenue from property tax into a central provincial fund to redistribute the funds to school jurisdictions. Without Provincial Treasurer Dinning and Minister of Education Jonson, in Mar's estimation, the move to this centralized taxation measure would not have been successful without their cooperating and acting on it. Additionally, Premier Klein's approval and consensus around the government caucus table helped to implement these measures in education funding. When I asked Mar whether this had changed in any way during the time that he had served as Minister of Education, he could not recall any changes of significance during his tenure in education.

Assessing whether or not school districts abided by the goals that the Department had established to achieve equity, Mar recalled, was accomplished by "the regular reporting back by school jurisdictions to the department on what they had achieved with the money that they had." Measurements of success in achieving these goals were collected from school districts and formed part of the Department's annual reports.

During the time that the reforms of the 1990s were aiming to improve equity, the question of adequate funding came up. There was a claim that without adequate funding, equity could not be achieved. However,

> I can say with some confidence that from the perspective of stakeholders it's never adequate, but the better question perhaps is, Is it appropriate? I think that we can say that no funding formula is entirely perfect in the sense that there will always be exceptions and legitimate criticisms of any formula that we put in place. But did it achieve primarily what it set out to achieve? I think that the answer is yes.

This led Mar again to speak of efficiency in the education system. He referred to my comment about Jim Dinning's interview that Dinning would have said that to achieve greater efficiency, one has to have a measurement of outputs "rather than simply a measurement of inputs." He quoted Dinning's line that "if you can't measure it, you can't manage it." When the government looked at efficiency, Mar charged that it had not compared how school boards spent their funding but had looked at the end results, which were found in the Department's annual reports. However, Mar was clear that the funding should fit the need and then produce end results:

> So to the best of our ability we try and compare jurisdictions with results, and then we ask ourselves, Are the differences in those results explicable by reason of the population of the students that are being served, or are there some other factors? . . . So I think we can still say that we can compare school jurisdictions on the basis of efficiency, look at the results, and then ask for the explanations, the deltas, as to why there's a difference in results.

For Mar, the results were what the Department could use to determine whether equity was being achieved and the school systems were efficient.

Funding is the least interesting part of the educational enterprise, to Mar's mind; the interesting element is putting in place programs that actually improve the learning of students, meet their needs where they are, and stress improvement and excelling, rather than "dumbing down the curriculum or attempting to improve their learning through some cookie-cutter approach." He believed that students, not money, need to be the centre of the thinking about education. The important questions in education, much as in health care, for which he was currently the minister, Mar said, should focus on

> how will this improve patients outcomes with respect to getting a service in a more timely way or improving the quality of that service? Similarly, in education every policy had to answer the question, How will this improve things for students? Our school system has to be centred on students and answer the question, How will this [any policy] serve them?

Assessment assisted in defining what was needed for students, both on a provincial scale and on an individual basis. Literacy is a program that Mar supported because, if students are not literate, he saw them missing out on many things, including being healthier citizens:

> The assessment of the abilities of students, I think, is what stemmed my interest in the early literacy programs. We needed to have as best as we can early intervention to recognize the needs of individual students, and so if a student is not reading up to grade level by Grade 3, by then we need to ensure that we provide that student with the appropriate resources to ensure that that student could read at grade level.

Human contact and caring are elements that Mar believed can make a difference in improving people's lives. Education and health care delivered by people with these values contributes to building individuals up and strengthening them, and, in turn, the society in which they live. Mar identified a study from Britain that tracked students every 10 years of their lives. The results show that a child's education is a good predictor of "what happened to them, and there are strong connections between the type of education that these kids got regardless if they were from Cardiff, Wales, or whether they were from—south-end London." The success of a student's education, Mar contended, determines the outcome equity.

The interview ended as the time that I had been allowed, 45 minutes, ran out. Although Mar appeared willing to continue, it was important to honour the commitment that I had made to his Executive Assistant that the interview last for only the allotted time.

CHAPTER SEVEN:

INTERVIEWS: DEPUTY MINISTERS

Introduction

Before each of their interviews, I wrote the former Deputy Ministers of Education a letter and provided them with the set of questions (Appendix F) that I would ask them, in addition to a set of definitions for equity (Appendix G) and the consent form that I would ask them to sign if they agreed to the terms, which they all did.

Each interview was transcribed and then summarized. I then sent drafts of the summary to each interviewee, asked that they edit the text and provide feedback, and made the changes that they noted to the summaries found in this chapter.

Each interview summary is arranged in the order that the Deputy Ministers served in the Department, beginning with Dr. Earle Hawkesworth, followed by Dr. Reno Bosetti, then Dr. Leroy Sloan, and last, Dr. Roger Palmer.

Dr. Earle Hawkesworth: Deputy Minister of Education (1971-1982)

I interviewed Dr. Earle Hawkesworth on February 19, 2004, at 2:00 p.m. at his home in Edmonton. Both he and his wife were very gracious and inviting. He was 87 years old, and his eyesight was failing; he was therefore unable to read any documents.

Dr. Hawkesworth served as Deputy Minister under Lou Hyndman, Julian Koziak, and David King. He began teaching in Nova Scotia. In 1958 he moved to Alberta and took a post as High School Inspector with the Department in 1966. Hawkesworth was appointed to take responsibility for the changeover in the hiring practices for superintendents in 1970 because, as an initiative of the Department , school districts took over this duty from the Department. He was appointed Associate Deputy Minister of Education on May 1, 1971, under Dr. R. E. Rees, the Deputy Minister. Clark was the minister. Following the August 31, 1971, provincial election when the PCs came to power, Hawkesworth was subsequently appointed Deputy Minister of Education under Minister Lou Hyndman. Dr. Rees, whom Dr. Hawkesworth succeeded, became the

Deputy Minister of Advanced Education under Minister Jim Foster. He retired in 1982 during the time that King was minister.

Hawkesworth characterized the situation in public education as not very equitable when he took over the job of Deputy Minister in 1971. "There was a great difference between the funding support in the elementary grades and the junior high school grades and the high school grades," Hawkesworth recalled. In his opinion, at that time "elementary education was grossly underfunded in relationship to other years of education." Improving on this inequity was one of the accomplishments during his tenure as deputy minister, but it did not come easily. There were two ways to improve equity. One was to lower the contribution of the government for junior high school and high school students; the second was to increase the provincial funding for elementary students. Hawkesworth reported, "The Lougheed government chose the better way by providing more money" and increasing elementary funding. However, before this was accomplished, there had been an initial effort to directly address the elementary funding arrangements in a manner that avoided the funding being directed to teacher salaries. He recalled Premier Lougheed's approaching him to devise a plan that would provide more funding for elementary education, with the condition that it would not be "swallowed up in teachers' salaries." After considering it over a weekend as he worked in his garden, on returning to the office, he met with the directors in the Department who were officials in what became known as the EOF. Hawkesworth gained Hyndman's support, and Hyndman made the EOF funding public. When Hawkesworth met with the superintendents, many of them opposed the plan; however, within six months the opposition turned to support because, as one superintendent said, "For the first time in my educational career I have some money that I can put directly to student needs." Hawkesworth concluded, "The teachers, as far as I know, welcomed it."

Following the EOF program another measure came into being under Julian Koziak's ministry to make funding more equitable between elementary and secondary. The discrepancies were reduced and "eventually disappeared because the government recognized the need to close that gap."

When I asked him about the introduction of ECS, Hawkesworth replied that the school boards wanted kindergarten, whereas what the government "wanted was a developmental program, . . . which we called early childhood education." The intention of the government was to establish ECS programs across the province and make them available to all eligible children. This was a new idea, and it gained support from kindergarten teachers, although many others, particularly the four large city school boards, opposed the idea. At a meeting with

> the Alberta Teachers' Association Barnett House, . . . I announced that there were not going to be kindergartens. And again, I thought I was going to be physically attacked. A year later, I have a plaque—on which the date is erroneous—thanking me for supporting this early childhood education.

However, the University of Alberta gave the government support, and "a committee was established under the chairmanship of the head of the university." When the ECS program began in Alberta, there were still problems to be overcome. School boards had to provide space in their schools for ECS classes. Hawkesworth recalled that the CBE created difficulties in implementing ECS when it refused to provide space and to implement the program:

> I remember going to Calgary to settle this matter about whether the facilities would be available for early childhood classes, and I met with representatives—not political representatives, but educational representatives—from both boards. And the [CBE] superintendent was adamant that he wanted nothing to do with this. And I finally said, "Well, sir, I've only one choice: We will have to move into Calgary as a Department and establish spaces for early childhood education." Now, the last thing the Calgary Public Board or its staff wanted was for the Department of Education to be in Calgary doing anything. The superintendent acquiesced.

Hawkesworth recalled "another area of inequity between the public schools and the Catholic school system . . . in funding." The whole tax system had been set up in a fashion that resulted in less favourable funding for Catholic separate school districts. The inequity existed "because of the difference between religious support of education and public support of it. The law discriminated or distinguished between the two, and it favoured public education," in Hawkesworth's opinion.

Julian Koziak was very influential in developing greater equity between the Catholic and public school systems. Hawkesworth expanded:

> He did it in two ways. He had the government change the formula . . . by financing, in so far as it was possible at the time, by amalgamating Catholic boards, all Catholic boards, and I'll give you an example. When I became deputy we were told that to amalgamate two Catholic boards, they had to have two boundaries co-terminus at the same time. However, due to Koziak, the time came when they said, "If they touch at one point, you can amalgamate them" [which made it easier for boards to amalgamate].

With amalgamation and an increased student population, it was possible to gain efficiencies and offer programs, thereby providing students with an improved opportunity for an education.

Hawkesworth credited Koziak with making significant changes to education. He recalled that "he made some very sound decisions," whether it was in the area of equalizing funding between elementary and secondary or achieving a better level of equitable funding between the public school districts and the Catholic separate boards.

Hawkesworth identified Hyndman as very instrumental in improving the requirements for the education of teachers. When he was Minister of Education, the required standard had been two years of teacher training; however, Hyndman wanted it to increase to four years of education for a teaching certificate. "And I remember going to him. The committee that advised the Department on this area was requesting an additional year," and Hawkesworth remembered

> very clearly taking that request to Lou Hyndman, and he said, "If one year is good, why isn't a degree? Let's make it a degree." . . . So I said, "Let's do it then." The committee was quite indignant when I took back Hyndman's response. I don't know whether this is because they had been bypassed in the decision. Oh, well, his mind was made up. My mind was made up too. It was too good a chance to miss. It was done.

Increasing the qualifications of all new teachers ensured from that time on that all new teachers would have four years of training. This helped to improve the equal educational opportunity for students, whether it was in rural or urban areas, elementary or high school. Up to this time, Hawkesworth observed, elementary teachers very often had less than four years of university education, and the same was true for teachers in rural schools.

When I asked him about the circumstances around the decision to improve the qualifications of teachers and deliver a more equitable level of qualified teacher in every school district, Hawkesworth replied, "Another person who was very influential in raising the academic qualification of teachers was Dr. Herb Coutts, the Dean of Education." Coutts was instrumental in arranging for teachers from around the world with minimum qualifications to come to the University of Alberta, receive upgrading, and leave with qualifications that allowed them to teach in the province. Hawkesworth remarked, "I think no one has really . . . recognized the work of Herb Coutts in this whole matter of equity for delivering qualified teachers to school jurisdictions across the province." This move helped to increase the number of teachers with four years of university education and, in turn, improved the qualifications of teachers in elementary and rural schools, which had not been required to the same degree before this decision was made.

Special-needs programs in school districts were new to the Department in the early 1970s. Hawkesworth spoke about the introduction of such programs and the difficulties associated with them. There had been a number of organized groups in the province who pressured the government for extra money to address the special needs of children. Although the groups were discrete and did not coordinate their efforts, their agenda was common: to gain the attention of government and gain assistance, primarily through funding. Hawkesworth addressed inclusion in the classroom:

> Today [special-needs students are] included in the ordinary classroom, which I still believe was a great mistake. I think that a goodly number of these children could be included in a special classroom. The argument was, they need socialization, but what I felt was going to happen, they would have socialization and nothing else. There are other reasons [against inclusion]: the pressure on the classroom teacher.

Hawkesworth had no further comments on the current funding of public education because he felt that he had not kept up on it. The current government did not "want to know that there are difficulties [out in the schools]." He did not elaborate on those difficulties.

The interview closed with Hawkesworth's recalling some difficulties that he had had with various school boards. Throughout the interview he was helpful, open, and gracious and did everything that he could to add useful information to the interview. He asked me to return to his house and read my summary to him to verify its contents.

Dr. Reno Bosetti: Deputy Minister of Education (1982-1995)

I interviewed Dr. Bosetti on January 27, 2004, at 1:30 p.m. in the kitchen of his St. Albert home. He was willing to talk and showed an interest in being interviewed on the topic of fiscal equity and equal opportunity. However, it had been difficult to locate him. Finally, via email his daughter, Dr. Lynn Bosetti, at the University of Calgary, encouraged me to contact her father through an email address that she provided.

Bosetti worked as a coal miner for about five years after graduating from high school. He went to university, took a one-year teacher training program, and taught high school from 1956 to 1965. After completing his bachelor's and master's degrees, The Department appointed Bosetti Superintendent of Schools for the Yellowhead School Division in 1966. He served in that capacity until 1970, when he was appointed Inspector of High Schools for Southern Alberta for two years. He resigned from the Department and moved to a position with the Alberta Colleges Commission. Bosetti had not been "happy with the way education was going. It was just not going in the right direction," and he then worked for the Alberta Colleges Commission until 1973. The commission was absorbed into Advanced Education, where Bosetti worked as Director of Planning Research, followed by an appointment as Assistant Deputy Minister for Program Services and, finally, as Assistant Deputy Minister for Finance and Administrative Services.

David King, Minister of Education, asked Bosetti to apply for the position of Deputy Minister of Education when Dr. Earle Hawkesworth retired from that position. When he accepted, it was on the condition that he be allowed to

> clarify the purpose and direction of education and make sure we assess its outcomes; that we deal with the inequalities in the system, which were rampant even then; and we rewrite the laws governing the education system and the

> School Act and do what we can to ensure that every child in Alberta has access to [meet his or her] educational needs.

King agreed, and Bosetti served as Deputy Minister of Education from 1982 until October 1995 when he retired.

When Bosetti took his position in the Department, there were over 20 nonoperating school districts with no schools and no students; however, they collected revenue from the property tax base, both residential and corporate. "This contributed to inequity. The equity issue was always a problem, and it was a huge problem at the beginning of my time with the Department," Bosetti said. I asked him if the definition of equity had changed during his tenure with the Department, and he replied emphatically, "I changed the definition." He recalled arguing with Dr. Bill Duke, Assistant Deputy Minister, over the definition because he felt that equalization did not address equity because the needs of school jurisdictions and those of their students were different. Bosetti believed that a better definition for equity was the best possible education for all children in Alberta regardless of where they live or the assessment of their community. To explain further, Bosetti described the discussion that he had had during his tenure with respect to equity:

> We were looking at increasing provincial taxes, payroll taxes, change the SFPF, differential SFPF plans. We did nonresident redistribution of the tax base, full funding. The one thing we really worked hard at . . . was corporate pooling. We had battles over corporate pooling. I didn't want to see the government take over the entire education funding. . . . My preference was corporate pooling, and that is to say we take the corporate assessment, tax it provincially, and redistribute it equally. . . . But equally is not what we wanted. We wanted equitability so that we dealt with the anomalies. In our definition of equity, it was to achieve the best that we could to the student's needs.

The Department held discussions with stakeholders in public education on methods to decrease the large inequities in revenue amongst school districts across Alberta. Bosetti recalled that after he became Deputy Minister in 1982, Department of Education officials, school district officials and school trustees, and the ATA met in the late 1980s and the early 1990s. Their objective was to improve equity among school jurisdictions, but there was no successful conclusion from the meetings. School trustees "absolutely refused" the Department's desire to resolve the inequities. The government initiative to reduce its deficit and debt in 1993 provided the opportunity for the Department to "make the big change [because] the fact is that we didn't have the money to do otherwise. Otherwise we would still be discussing alternatives." Bosetti remembered promoting corporate pooling as an alternative, but to no avail. Trustees of the wealthier school jurisdictions that accessed a large corporate tax base would not agree with it. Bosetti said:

> We had to take over the whole tax base, and they thought I was crazy. I said, "Well, keep hollering and don't agree. I told myself that I could do it alone. It was inevitable. It had to be done, and when it came to reducing grants—that was 1994—[the government took over the educational tax base].

In the autumn of 1993 Bosetti and Jonson both knew that the plan was to cut 20% from each of the departments. When Dinning asked for 20% from education, Bosetti replied, "It can't be done! It just can't be done!" He explained that some school districts could have their revenue reduced by 20% with little consequence to their operation, whereas other school jurisdictions could not continue to operate with that level of reduction. Bosetti replied emphatically to Dinning, "There's no way. You cannot run Cardston with a 20% reduction."

What were the measures employed to centralize the collection of residential taxes, pool the revenue from corporate taxes for education, amalgamate school districts, and reduce the revenue to school boards? In short, why did the changes in 1994 occur? Bosetti answered, "[It was] the right time, the nexus of events that came together. It was a causal nexus." He recalled Dinning telling him, "We wanted to shut down those nonoperating school districts [when I was Minister of Education]." Bosetti responded that the events were not right to make that move at that time. The circumstances were different soon after Jonson became minister, and Bosetti said, "We were prepared to do it. We had all the information."

The Catholics still presented a "tough problem," Bosetti reported, because they had a right to a separate school district regardless of what was done provincially. That was their constitutional right, and the government, "did not want to compromise it":

> We did all the research, and we finally got to a point we knew all the districts that were there, the 20 or 30 nonoperating districts, . . . and we knew that they didn't need to be there. We met as an office committee. . . . It was agreed that we would shut the [nonoperating districts] down.

One of the meetings with school boards in which the Department attempted to come to a consensus on the inequities of revenue generation was held, as Bosetti recalls, when he and Jonson went to Calgary to meet with representatives of all 24 nonoperating districts. Jonson told them, "We're going to shut you down," and he explained why. Nonoperating districts had formed around pockets of wealth, and it was seen as a "tax grab." Bosetti remembered Jonson saying:

> You're the nonoperating school districts that are simply not paying any residential taxes because a large gas plant can be taxed. You'll get a couple mills on their assessment, and it is enough to run your whole bloody system and not pay any provincial taxes.

Jonson left the meeting for another appointment and left Bosetti to explain. The representatives disagreed with Bosetti and protested that the government could not "shut them down." Bosetti recalled:

> The thing that finally capped it was Cranberry Hills. The guy from the Cranberry Hills stood up and he said at this meeting, "You know, we cannot afford to pay any more taxes in Cranberry Hills." And I replied, "Well, I think it's interesting you say that we can't do that because the average mill rate is 11 mills [across the province], and yours is 1.2 mills." That did it. I knew everybody's mill rate. . . . Everybody just packed up their books, folded them up, and [left the meeting].

Bosetti concluded this portion of the interview with, "So we did it!" The government had the information and had done the research and, based on these factors, had proceeded "with the plan to eliminate nonoperating school districts." Operating on a consensus model might be a mistake for the government to take on issues such as the elimination of nonoperating districts, Bosetti opined, because often the outcome is mediocrity. There are alternatives to the consensus model, and Bosetti chose one of them:

> To divulge, disclose, and get people to agree to where you're going, not to how you get there. . . . You've got to get them to agree that this is where we're going to go. So when that's done, then you can do the rest of the things.

By using this approach, Bosetti explained that he and the government were able to take advantage of all of "the elements coming together [through a] causal nexus." School trustees had been telling him that the government should eliminate the nonoperating school boards, and this was part of his plan to reduce the number of school boards across the province. Bosetti said, "When we were able to reduce the number of school districts, then we could move to reducing the expenditures."

Full provincial funding was not what Bosetti wanted to see, and prior to 1993,

> there was a rationale for not going to full provincial funding. I didn't like it. I didn't want it. My view was that residential property tax, taxes on residential property, should in all respects be for the purpose of maintaining the property. They should not be used for anything other than property.

Alternatives other than property tax to generate revenue for education had been explored, including sales tax, Bosetti added; but in the end there were no new avenues for revenue generation. Instead, the government took full responsibility for funding education and took away from local school boards the ability to tax property, except through plebiscite. Bosetti was concerned that removing the direct impact of property taxes at the local level would cause the public to lose touch with education and the need to support it:

> My personal view was to retain the taxes on residential property for the very simple reason (although it may be too obscure) to ensure that there was a public commitment to education. I wanted a transparent tax, fully transparent so people will know what they are paying for education. . . . In my view the whole education system would suffer badly if the province took over entire funding without a visible tax to be used in support of education.

Bosetti was also uneasy that "if the revenue collected from local residential taxes was not entirely transferred to education, little pieces of it may have been squirreled away, because governments can do that." The government wanted to make sure that property taxes were acquired for educational purposes and used strictly and solely for educational purposes. As a result, Bosetti said, "We ensured that the funds collected from residential and corporate taxes would all be directed back to operating school districts." This equitable disbursement allowed those property taxpayers with a more than adequate ability to support education to share it with those in other jurisdictions who were unable to meet the same revenue from property taxes, according to Bosetti.

Bosetti addressed a number of alternatives to solve the inequity in local tax generation. He recalled that his sentiment was that property taxes not be used to support education, but he did not want to introduce a new tax because, in his opinion, a new tax would "never go away. They're just like a lifelong brand—forever."

One of the changes to the tax regimen was the elimination of the Machinery and Equipment tax, or the M and E tax, as it was then known. "We lost that one, and we lost the assessment for education purposes. I still am upset about it because it was about a 30 million dollar loss at that time," Bosetti recalled. He wanted to replace the revenue lost with another source. "I didn't care where we got it; I wanted it replaced," Bosetti said. "So I did more fighting for education, . . . [and] we ended up with a 5% percent cut in education [rather than the 20 percent that was asked for]."

The government faced considerable controversy when it came to dealing with the Machinery and Equipment tax and eliminating it as a source of revenue. The story unfolded in Bosetti's recollection thus:

> We were told they wanted us to cut 20 percent. That was the target for everybody, and I said, "In our department we'll cut 20 percent. We'll cut 24 percent." We had done some planning. "It's going to be tough. We'll cut 24 percent." I said, "But we cannot cut education, because if we take 20 percent from Cardston and a whole bunch of districts, they're broke. They'll roll up the schools and eliminate them if this happened. . . . They cannot do it. And others, you go to Fort McMurray, they won't even notice. They'll say, "A couple of bucks; not a problem."

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Alternatives were discussed, and Bosetti held the position that the government could not make a 20% cut and see many school districts survive with such a significant reduction. After examining the alternatives, Bosetti recalled, Jonson finally concluded that "full provincial funding" would be the solution, and "Jonson said it. I didn't. He said it, and I waited for him to say it. . . . That's how it came about. It was a necessity." Bosetti believed that "it became a far more equitable system, and the taxes were reduced." Property taxes were reduced from an average of 11 mills to 7 or 8, he recalled, and he concluded, "So everybody ended up paying less individually. Some paid more because they weren't paying anything, but we evened that out. So it's fairly equal and equitable."

One of the benefits of the changes made in 1994 was the move away from the Department's management to micromanagement of school districts and towards simplifying grants further. Bosetti recalled that the Department decentralized the grants to school boards to deliver funding through three block grants:

> One was an instructional grant, support grant, and capital grant. Three blocks. And one thing we wanted was for the instructional grant to have 80% of the monies go to the classroom, and that's what I wanted. And [school boards] couldn't transfer money out; you could transfer into it. . . . That has the most value. So 80 percent goes into classroom instruction.

Bosetti reviewed the changes in 1994 and discussed their effect on equity:

> Equity needed to be addressed. Just make it equal, because if you've got equality, then it's equal. Equity is a tough nut to get because that means according to need. So I think we've improved equity. Equality, I think it's a term that doesn't apply very much. It doesn't say very much. We could be equal under the law, but if you happen to be of a peculiar interest, thanks to the Charter of Rights and Freedoms [you may gain special privileges].

Bosetti read from a monograph that he had written for the Alberta Colleges Commission, *Master Plan One*, in which he laid out one of his foundational beliefs—a belief that guided him in his decisions in government. He said, "See, this whole matter of choice. You see, the school of choice comes from this." He then read from the monograph: "If man is perceived as being free and capable of perfectibility, it follows that he requires a strong element of choice as to how and to what direction he may choose to perfect himself" (Bosetti, 1972, p. 20).

Another of Bosetti's beliefs about government—or about any system, for that matter—was that it is necessary to be able to set clearly measurable goals and outcomes and then set up a system to measure whether or not they have been met. He argued, "I think it's absolutely ridiculous to say to people, 'We'll pay you to teach something, but we can't measure what it is.'"

In closing, Bosetti summarized his career as follows:

> I liked what I did in education. It is for the benefit of kids, nobody else. I think we did a good job, and we've got a good organization in the province. Teachers do good work. That was the whole object. Everything that I did was to give the best education I could for kids.

After two hours and two cups of coffee, the interview ended. We chatted briefly about my return of the summary to him for his consideration and editing, and then I left.

Dr. Leroy Sloan: Deputy Minister of Education (1996-1997)

I interviewed Dr. Leroy Sloan on February 18, 2004, in the living room of his condominium in Edmonton, Alberta. He welcomed me into his home and served coffee. We talked briefly about our families, because we had known each other since he had been Assistant Superintendent of the County of Parkland for two years with responsibilities for schools, one of which was Muir Lake Community School where I had been the principal from 1986 to 1996. The interview lasted about 70 minutes.

Sloan began his teaching career in British Columbia and then moved to his first administrative position in Turtleford, Saskatchewan, at Livelong School. He earned a Master of Education degree and went on to doctoral studies at the University of Alberta. Upon completion of his PhD, Sloan joined Central Office staff in the County of Parkland, followed by an appointment as Superintendent of Schools in Kelowna, BC. In January 1996 he was appointed Deputy Minister of Education in Alberta, a post that he held until September 1997. Since that time Sloan has served as Senior Advisor to the Alberta School Boards Association, in addition to running his own education consulting service.

Experience in three provinces as a teacher, school administrator, and superintendent gave Sloan a broad perspective on approaches to reaching equitable arrangements on both sides of the education funding equation—fiscal equity and delivery. He said that equity for the taxpayer improved, for the most part, in Alberta when the fiscal framework changes were applied from 1994 through 1996. His definition of equity was "the equal treatment of unequals as unequal; and therefore there needed to be a way to differentially distribute the money." Sloan credited Russ Wiebe, who served in the Department prior to and during Sloan's time as Deputy Minister, with "being the mastermind for establishing the new revenue and distribution arrangements for education under the new fiscal framework . . . in just six weeks." Although he recalled that the arrangements were not perfect, what Wiebe had accomplished was "pretty phenomenal given . . . something as complex as a distribution formula for funding that would be equitable; it is amazing how good it was." Sloan believed that the government did not have to go as far as it did with pooling tax revenues and that it could have left residential property tax for education in the hands of local school boards. However, this had not occurred; "the choice was made because the school boards couldn't agree on a direction when requested by government to do so."

Catholic school boards challenged the government and threatened to go take it to court when the province redirected property taxes for education to the provincial coffers rather than to the local Catholic boards. The Catholic boards won the argument before a court decision—what Sloan termed a *pyrrhic victory* because, although the Catholic boards had been given the right to maintain their constitutional right to tax property for education, they were not allowed to receive any more funding than their counterparts in the public school systems did. This arrangement still meant that most of the Catholic school boards would receive more funding than they had prior to 1995 under the old rules and regimes of taxation. Therefore, from a revenue perspective, Catholic school boards received funding equal to that of other school boards and maintained a sense of autonomy by levying their own property tax.

Sloan recalled that a committee for the school boards and the Department was established to monitor the funds collected for education from property taxes and distributed to school boards. The committee's purpose was "to make sure the money collected for education was used for education and not redirected into other areas, that it was all spent for the intended purpose."

In the Severely Learning Disabled (SLD) funding, a cap had been applied to the number of students who would be funded prior to Sloan's joining the Department. This was because "there was a perception of a 'fund 'em, find 'em' fear within the department." As Deputy Minister, because Sloan wanted to determine whether there was substance to that fear, he sent people into the field to investigate. They informed him that that there was a need for the funds and that "there were just lots of [needs]." The data were compelling. He decided to remove the caps on the number of students to be funded.

This measure improved the level of equitable access for the SLD students who needed extra help and was a move towards a return of some of the loss to schools and students that had resulted because of the cap.

Mild and moderate educational needs were block funded because it was perceived that the incidence level was a fairly consistent percentage of the student populations within each school district. Sloan was not concerned with this assumption and during his tenure began to identify specific incidence rates:

> [When] the fiscal framework came in as a distribution formula, there was a deliberate decision to cut the provincial budget, including education. What you really had was a sufficiency issue that you're dealing with. The distribution issue in the main was that you put an artificial cap on it.

He noted that incidence levels rolled back, and people responded extremely well. However, if there appeared to be not enough money for mild and moderate students, it was because of two factors: differential incidence rates and overall reduction in all funding.

The CBE had claimed that the property tax funds collected by the government were not being fairly distributed back to Calgary. Furthermore, the board argued that it was not being funded adequately given its costs. Minister Mar ordered an inquiry into the matter through a committee headed by Steve Cymbal, a former Assistant Deputy Minister in the Department. Sloan, as the Deputy Minister at the time of the inquiry, recalled that the Premier, the Minister of Education, and a significant number of MLAs, all from Calgary, aroused sympathy in the caucus to "getting a fair deal in Calgary; . . . [in the Department] we were willing to listen to a convincing argument." The problem was that the school board members were

> politically positioning themselves in opposition to the government instead of being on the same side of the table and saying, "How do we ensure that our taxpayers and our community is being treated fairly?" It was one of adversarial relationship.

With this relationship, Sloan concluded, any fair and equitable deal for the CBE was not going to occur.

When I asked him about other grants designed to improve equitable distribution of educational funds, including the sparsity and distance grant and the equity grant, Sloan reiterated his praise for Wiebe in establishing the new funding framework in 1995. Although he described the work as very commendable, Sloan accepted that it was not perfect; therefore, Sloan asked the members of his Department to continue fine-tuning the funding framework to improve the equitable distribution of funds. Wiebe considered funding for rural transportation and operations and maintenance, and the funding formula for both was adjusted to a point at which they were deemed more equitable.

Another matter of equity for school districts involved capital funding for school districts. Sloan felt that they had been properly addressed by the bureaucracy prior to and during his time as Deputy Minister:

> There was a framework by which they were supported to filter all of the requests. Just an excellent, rational job, and you might quibble over number six or seven, but there was a rationale for why they're in the top few.

However, when I interviewed him, Sloan contended that there was a "strongly held belief . . . that [capital funding for school boards] has moved to political decision making and eliminated equitable treatment between [the school] boards." In summary, he said that money spent in the wrong place to fulfill a politician's whim meant that some other place that needed the money was left out, and fairness and need were not addressed.

In 1993 the Department decided in conjunction with the Provincial Treasury to bring about more equity in taxation and the distribution of funds. The politicians, Sloan reported, made equity a prime consideration in their policies related to education. Capital spending for facilities was one area that he believed did not get enough attention in the move to achieve equity. In rural Alberta and the inner cities this should have been addressed. He contended that it was still an issue. Political interference occurs when certain politicians seek favours to have schools built in their areas, requests that are not based on sound, rational evaluation of need and from a curricular perspective, but rather on political expediency.

In trying to create equitable programming delivery for remote areas of the province where students may not have access to a qualified teacher, the Department increased funding for the Alberta Distance Learning Centre (ADLC). Funds were directed toward course development, and the courses were made available using technology rather than paper and pen. These resources, such as whole courses on CDs, were offered to students who needed a distance learning program and to teachers in remote areas or in small schools to support their teaching. The program was successful. Completion rates rose, in some subject areas to 80% at ADLC, whereas when the Department offered the courses, the completion rate was only 20%. Sloan saw this as a success story because it improved equitable access for students to a broader range of programming.

He added that other electronic efforts have been made to link classrooms to allow students in distant areas to be taught by specialized teachers via teleconferencing from a larger centre. These course offerings also improved equitable programming access for students.

Sloan recalled that when he was Deputy Minister, "data-driven decision making was the key" to improvements in the areas of transportation, sparsity and distance, special needs for students, distance learning, and facilities, which, in turn, facilitated a more equitable delivery of education to students across Alberta. In the interview Sloan suggested that data-driven decisions were not being made as extensively as they had been during his time in the Department.

Sloan spoke of the current funding of education and the need for consistent, rational decisions. He said, "On the funding formula part, Minister Oberg said that the funding formula needed to be fixed because there were so many exceptions being made." When such exceptions are made to the processes set in place to achieve equity, it fails, as do the priorities attached to it. He called this process of making exceptions to established, rational funding protocols "cherry picking" of whatever was politically suitable at the moment. There may be compelling reasons for a "cherry-picked" decision, but it does not meet objectives and will not achieve the goal of equity, Sloan submitted. Typically, these decisions end up costing more money than budgets allow for the original rational plan. Sloan reiterated, "So the funding formula was not a bad funding formula for one that was created in six weeks. It was fantastic."

As the interview came to a close, Sloan shared a few of his beliefs related to education and equity: "Sameness is going to create inequity, and therefore if you have equality, you're not going to have equity. There is a need for differential funding to try and give an equitable opportunity for all kids."

Sloan's evaluation of the funding formula that was in place at the time of the interview was that it "has not been that bad." The problem in many cases was that exceptions had been made. He quoted an old adage: "Your system is perfectly designed to get you the results you're not getting." If the design is to allow political interference, an ideal such as equity may be corrupted.

Dr. Roger Palmer: Deputy Minister of Education (1997-1999)

Dr. Roger Palmer, Deputy Minister of Health and Wellness, was interviewed on February 24, 2004, at 1:30 P.M. in his office in the Telus Building in Edmonton. The interview took 45 minutes.

Dr Palmer had initially completed a Bachelor of Science Honours degree in theoretical physics in Britain. In the late 1960s he came to the University of Alberta and completed his PhD, also in theoretical physics. Soon after, he earned a postgraduate teaching certificate from Cambridge and began teaching at Eton before returning to Edmonton, Alberta, where he began teaching in the Edmonton Public School Board (EPSB).

After teaching and then serving in various capacities in EPSB's central office, Palmer was appointed Director of the Department for the Edmonton region in January 1986. This was followed by an appointment as Assistant Deputy Minister until he was appointed Deputy Minister of Education in September 1997, a post that he held until 1999.

Palmer spoke of his interest in equity for students. He had worked on the revisions to the 1988 School Act, a project that placed students in a primary place within the act. That work provided the mechanism whereby an improved delivery of equity (equality of opportunity) was achieved across the Province of Alberta for all students. In addition, Palmer's experience and work in the Department with the MFP under Dr. Bosetti increased his interest in equity for students. He explained, "And as we slowly evolved the Finance and Management Plan into the equity structures of the late '80's, all that experience helped in terms of what I thought was a reasonable way to approach fiscal equity."

Outcome equity was a topic that also intrigued Palmer, although he admitted that his efforts to apply it for the most part had failed. Educational opportunity and the potential to achieve equitable outcomes were—and still are, he believed—in widely different and varied circumstances from one school district to another across the province. This became a central theme for the rest of his career in education. He contended that if the Department was going to accomplish reasonable and equitable outcomes for students, then they had to have more time and resources to achieve their potential. In his last two or three years in the Department he had spent time in trying to offer "flexible timing and various styles of credit units within the high school to allow people a lot more flexibility, because I saw . . . how I can get you to desirable outcome without [restricting time for completion]."

Palmer also broached the issue of social equity, which he defined as "how you use a limited resource to the best possible good of society." This is a topic that is relevant to the school system and to health, a problem that he faced every day.

The delivery of equitable learning opportunities for students was improved when the School Act was rewritten in 1988 when Betkowski was Minister of Education. Palmer stressed, "Centring on the student was the central theme." He saw the act's focus as a fundamental change in the sense that it clearly spelled out the education community's goal to provide equitable outcomes:

> I thought that the new School Act was an interesting breakthrough because it was a big driver in how we started to deal with the issue of the access of people in rural Alberta to some of the opportunities which you could only get in the cities.

Palmer credited Dr. Bosetti with this view that the new act presented for improving student equity. He believed that Bosetti's term as a superintendent and in Advanced Education made him acutely aware of the differences in opportunity and the range of services that students could access, and he knew that Bosetti was determined to make a real difference. The 1988 School Act was a vehicle for the change that Bosetti believed was necessary.

When I asked Palmer whether the definition or the delivery of equity changed during his time with the Department, he replied that the definition of equity in the education system slowly evolved. He did not remember anyone talking about it at the beginning in terms of any assumptions that outcome equity could be reached, but by the time he left the Department, it had become a strong topic of discussion.

In the late 1970s, Palmer recalled, people were very concerned about the unequal distribution of resources. Because some of the school districts in the province had access to taxes from a large industrial base, they could easily raise funds without putting a significant tax levy on residential property. Other school districts did not have access to an industrial tax base and had to rely on highly taxing residential property. These discrepancies amongst school districts impelled Palmer, Bosetti, and others in the Department to work towards a revenue-generating system that was equitable and, in turn, would deliver funding to local school districts and, ultimately, students in an equitable fashion. The Department's goal was to provide every student in Alberta with a reasonable share of the public resources to put towards their education. Further, he believed that the tax system should result in every Albertan making a fair, reasonable, and equitable contribution toward this public good.

There were nonoperating school boards who did not actually operate even a single school, Palmer recalled, and when the new fiscal framework was introduced and the number of school districts was reduced, the nonoperating school districts, some 40 of them, were the first to be eliminated. They "were the ones that just blew any attempt at equitable treatment of some the students out of the water." Eliminating these districts and taking their taxes, corporate and residential, into a central government pool for distribution to operating school districts moved the education system significantly towards equity for students.

Although he did not attend, Palmer remembered the day that Jonson and Bosetti met with the Treasury Board. Jim Dinning, the Provincial Treasurer, was in the chair. Going into the meeting, Palmer recalled,

> Jonson and Bosetti thought they were only going to get rid of commercial industrial taxation and they were going to leave the residential tax base. By the time they came out of Treasury Board, they had decided that the whole thing was going to change all at once.

That was a huge task and a huge shift, and Palmer surmised that with Dinning as chair of the Treasury Board, he would be able to lead the debate easily on revenue and funding education because he had been Minister of Education. Dinning's knowledge and his respect for Dr. Bosetti and Jonson put the enterprise of working out a solution on tax collection on a common and agreeable footing.

When I asked Palmer about balancing the needs and costs of meeting special educational needs against the needs of the regular students, he said that "98 percent of your problem is getting the right [balance]." Achieving a fair distribution of resources between special-needs students and "regular kids" was the key, to Palmer's mind. In addressing the needs of special-needs students, the government always has to be cautious of not making the "'severely normal' . . . underprivileged" by overemphasizing special needs.

Palmer recalled that the Department constantly tried "to tinker with . . . pieces" of the funding formula. Sparsity and distance were classic examples of areas in which the funding framework was adjusted:

> Everyone believed that if you're in an organization where you had lots of little schools [with] travel distances and things like that, you're in a situation that intrinsically is more expensive to operate than if you could have economies of scale.

The Department came to that conclusion after any analysis that it did, Palmer concluded. In order to be fair and equitable following the reforms of 1994, he felt that these factors needed fine-tuning.

Palmer ended the interview by predicting that one day someone would argue a particular case and the Department would move the formula "a little bit one way. A year later we'd move a little bit the other way, because I think we were just oscillating around a reasonable compromise between complexity and fairness." The secret, Palmer believed, was to make the complex issues of equity and fairness and the system as simple as possible to make it transparent, not only to the school districts, but also to all Albertans.

Summary

Each deputy minister brought a different perspective to his work, as did the ministers they served. Hawkesworth fulfilled the directives from the ministers and worked on improving equal opportunity for students. Bosetti addressed accountability and fiscal equity during his tenure. Sloan and Palmer both held their posts for less than three years, and although they influenced the decisions of their Department, their leadership had more to do with fine-tuning and maintaining what had already taken place during the educational reforms prior to 1995.

Deputy ministers experienced a changing revenue and funding picture for education, beginning with Hawkesworth, who worked in an environment of improving provincial revenues from resource royalties. He often spoke of introducing new programs such as special education and early childhood services. Bosetti, on the other hand, came into his position during a significant downturn in provincial revenue from resource royalties. He saw accountability and fiscal management being challenged by the growing inequities between school jurisdictions and needing solutions. Sloan was faced with making adjustments to the funding formula and the reforms that followed 1994. Palmer was responsible for maintaining what had been accomplished with the reforms and doing some additional fine-tuning.

CHAPTER EIGHT:

INTERVIEWS WITH GOVERNMENT OFFICIALS

Introduction

Prior to each interview with the government officials whom I had selected, I wrote them a letter and provided them with the set of questions (Appendix F) that I would ask them, as well as a set of definitions for equity (Appendix G) and the consent form that I would ask them to sign if they agreed to the terms, which they all did.

Following the interviews, they were transcribed and then summarized. I sent the drafts to each of those interviewed, asked that they edit the text and provide feedback, and made the changes that they noted to the summaries found in this chapter.

Each interview summary is arranged in the order that the officials began their service in the Department or in government as the case may be. The individuals interviewed were Mr. Al O'Brien, Dr. Jim Hrabi, Dr. Bill Duke, Dr. Russ Wiebe and Mr. Steve Bemount. All of the individuals had retired from the positions in government except for one, Mr. Bemount, who still worked in the Department.

Mr. Al O'Brien: Deputy Treasurer (1995-1999)

The interview took place in Mr. O'Brien's office in the Tory Building on the University of Alberta campus on January 24, 2004, at 10:00 a.m. O'Brien allowed me as much time as needed to complete the interview, which turned out to be about one-and-one-half hours in length. He placed no restrictions on the interview.

O'Brien began working in the Alberta Provincial Treasury Department in 1965 to determine how Alberta would earn equalization payments from the federal government. He later moved to working on the budget side of Treasury, followed by seven years as controller. Following this assignment, he was appointed Deputy Treasurer of Management and Control; and in late 1995 O'Brien was appointed Deputy Treasurer. He retired in 1999.

O'Brien began the interview with an overview of federal equalization payments and the Province of Alberta's change in status from a have-not to a have province.

Alberta stopped receiving equalizations payments from the federal government in 1962, and Premier Ernest Manning had questioned him and other Treasury officials about why this was so.

To his recollection, O'Brien said, when Alberta became a province in 1905, one section of land in each township had been set aside for schools to raise income for education. When he began working in the Treasury, the province owned these sections and was still collecting rent from farmers. The rent revenue, which amounted to about $2 million annually in the 1960s, went into the SFPF as a small supplement to other revenue gathered to be placed in the fund.

In speaking about equality and equity in the collection and distribution of funds for education, O'Brien said, "Most of the equalization discussion in government that involved the Treasury was at kind of 30 thousand feet. It didn't worry about the variations in needs." Treasury discussed the funding of education in terms of fiscal capacity, but not fiscal need. It did not worry about how much more revenue handicapped students or any others needed compared to others. That was left to the Education Minister to sort out, according to O'Brien. He explained that

> the treasury only worried about the cost pressures that those kinds of programs drove, and whether or not there were disincentives. Our perspective on the question of fiscal equity in education finance tended to be focused fairly simplistically on the average per student grant and on the property tax and on the link between the fiscal demands and pressures of the municipalities and the school systems.

The Treasury Department was concerned about the wage pressures that all levels of government, including public education, were experiencing from the 1970s until about 1985. Collective bargaining in the public sector and the models found in labour statutes that were intended to establish collective bargaining agreements was of concern to Treasury officials. Combined with this trepidation was an acknowledgment that in public education, O'Brien recalled, "some local property tax powers for the school boards was understood to be an important sort of release valve to a degree on collective bargaining pressures in the educational system, but also a kind of reality check on the school boards."

In speaking to the equalized property tax assessment system that had been developed in the 1950s, O'Brien claimed that it worked reasonably well and gave a "pretty good base" in the 1950s and the 1960s for revenue destined for both public education and municipal needs. It had been developed by the Manning government after the Second World War. Under Manning's Socred government, Alberta had developed, according to O'Brien, one of the strongest municipal affairs and education departments in Canada of its time. The equalized property tax assessment and the co-terminus boundaries that had been established between municipalities and school boards contributed to the provincial government's success in funding education.

During the 1970s and 1980s the Ministers of Municipal Affairs lost sight of the bigger picture of local governments' roles in financing public education. Instead, they appeared interested only in per-capita grants for municipalities. The SFPF was no longer of interest for these ministers, and they failed to recognize the importance of fiscal equity for public education and its impact on municipalities. School financing pressures built up through the 1980s because local school boards were requesting an ever-increasing supplementary requisition from their municipalities. This, in turn, put more fiscal pressure on the local municipalities and their primary source of revenue, property taxes, which were the same source that the school boards were using. The interrelationship appeared to come to a head during Jim Dinning's tenure as Minister of Education and Ray Speaker's as Minister of Municipal Affairs.

Although Dinning promoted fiscal equity for public education, in O'Brien's recollection the Getty PC government, with Dinning as the Education Minister, did not see adopting a tax system that would have the province collecting 100% of the fund. Instead, Dinning wanted to restore the elements of the original 1960s SFPF, an approach that would cover 90% of the basic funding for public education, but leave school boards with taxing power for the other 10% of the required funding. O'Brien reported, "It was only as we moved into 1993-1994 and Dinning, as Provincial Treasurer, struck the Tax Advisory Committee that the Treasury and Alberta Education considered taking over 100 percent of the revenue for public education." He continued:

> And going into that, we didn't initially intend [that] the Tax Committee recommend removal of the entire school boards' right to tax, but as we moved into it, it became apparent that you might as well be shot for a sheep as a lamb; that was the comment. Bosetti, Jonson, and Dinning, who were most familiar with this issue, came to the conclusion that we might as well go for the whole wad.

During the period that O'Brien acted as fiscal advisor to Pat MacKenzie's Commission on Education, he argued strongly for restoring some property taxing powers to school boards partly because of the collective bargaining pressures that the school boards were experiencing. However, MacKenzie's view was that there was no way back to the regimen that existed prior to the 1994 changes to the fiscal framework in public education. What happened as a result was a series of teacher strikes in 2002 across the province that ended in arbitration settlements that no one controlled, but for which the school boards had to pay. In O'Brien's opinion, "If you gave the school boards enough power, maybe we could [have made] our way back" and have avoided the teacher strikes of 2002.

How did the province, school boards, and teachers find themselves in the predicament of facing teacher strikes in 2002? O'Brien said that when the SFPF was introduced in 1961, it financed about 90% of the cost of public education; the other 10% came from the school boards' supplementary requisitions. Over the years the provincial government grants decreased in relation to the total cost of education, and school boards made up the difference in costs not covered by government grants by seeking an increasingly larger supplementary requisition from local ratepayers. When the Peter Lougheed PCs came to power, one of the commitments in their election platform had been the removal of the residential property tax for public education. O'Brien recalled that in the Treasury it was believed that it was not possible to finance such a move. When Lougheed took office, he set up a committee chaired by Dave Russell that recommended in 1973 that property tax supporting the SFPF be removed. The Treasury implemented that recommendation. This brought the provincial government's proportion of the cost of public education back up to 85%. Then from 1979 to 1994, O'Brien recalled, the government's portion began to decline to just over 60% of the school boards' costs. This happened despite the problems surrounding the issues that prompted a number of government studies and various discussions with school boards and municipalities.

O'Brien recalled that the formation of "4 by 4" school districts, which might or might not have had students in them, was one of the problems that "came to a head in the 1980s." Catholic separate school supporters often used the 4 by 4 rule provided under the School Act to form new school boards, thereby capturing the revenue from corporate tax. Although the public school jurisdiction in the same geographic area had as much access to the tax revenue as any newly formed Catholic district, other school jurisdictions might not have. Public school boards also gained revenue advantages in the same manner; for example, Strathcona had the advantage of receiving the corporate tax base from the chemical plants east of Edmonton. As a result, Treasury "tended to favour the equalization schemes of the government, but partly because of our concern about equalization for the municipalities and the per capita on conditional grants, which had an elaborate formula. Nobody really understood the formula," and no one in the provincial government had seriously reviewed the formula through the 1970s and 1980s. O'Brien revealed:

> We used to joke that you had to count how many crows there were in the municipality and so on flew over in 24 hours or something. It was quite an arcane fund, and no one really understood it, and it wasn't a particularly effective form of equalization.

In O'Brien's recollection, "It was only after Dinning became Minister of Education that we became really conscious in the Treasury of these severe inequities on the education spending side. However, it was Dinning that started bringing the problem onto the radar screen." This had not been a focus for Treasury to this point; instead, the focus had been on revenue and on keeping wage pressures in the public sector, including teachers' salaries, manageable. Not until January of 1994 did the Treasury believe that it was possible to remove the school property taxes entirely from school boards. O'Brien recalled, "That hadn't been in our wildest dreams," and Dinning had taken the idea to two successive PC policy conventions and received approval; however, when he took the idea back to the government caucus, "he always got blown out of the water . . . because a lot of people thought it was somehow vaguely socialistic."

In O'Brien's opinion, because the City of Calgary has always had a high average household income, Calgarians felt that they should be the best in every way. He said, "There's no formula that's objective or rational in any way, shape, or form that will fund Calgary Public at the level they want to spend there." He explained:

> Calgarians are better educated than most of the province. They have higher incomes than most of the province. They are heavily influenced by the oil patch, and they tend to want the best. They want to be able to spend money on social services as well as golf club memberships.

However, if an area in the province is wealthier, the assessments and property tax revenue are higher, the costs of a service are typically higher than average, and inflation rates are higher than those in the rest of the province. Supplementary requisitions levied by Calgary school boards in the past usually reflected that. O'Brien believed that by reintroducing the ability for local school boards to request a supplementary requisition, those school districts with the wealth, the ability to pay, and the higher living costs could relieve some of the cost pressures that they were currently feeling. It could also allow school districts to increase salaries in areas where it is difficult to attract teachers.

In addressing the funding formula projected for September 2004, O'Brien said that, as far as he knew, the formula would address some urban issues such as responding financially to offset the costs of exceptionally high growth or declines in enrolment. Special grants for Aboriginal children, redefined formulas for sparsity and density, and grants to address socioeconomic needs are all being considered in the new formula in an effort to address equity in school systems across the province. However, O'Brien protested, school boards are not receiving support to adequately address "the basic cost differences like [aged] infrastructure that's going to need different maintenance costs, like teacher's salaries."

In 1993, O'Brien recalled, the chemical and petroleum industry had studied the Machinery and Equipment tax and concluded that the tax was excessive; the industry had data to back up the claim. "They started really producing data that . . . some in Treasury became pretty impressed with." The large oil sands petrochemical companies did not complain about the tax; however, the Canadian Manufacturers Association and the

Canadian Chemical Producers did. They lobbied the provincial government to eliminate the tax. O'Brien's sense was that

> one of the huge things was [the] Machinery and Equipment [tax] becoming a huge issue and Ralph Klein really becoming convinced as he came in as Premier that this was something that needed to be addressed. At the same time you had Dinning really building the case with how much education disparity was evident in the province, . . . and then you had the Treasury saying, "We've got a three billion dollar deficit. How can we afford to eliminate the Machinery and Equipment tax, even for education?"
>
> There was a focus on the Machinery and Equipment [tax], and the provincial government came up with the notion that the municipalities should still be able to tax machinery and equipment because, arguably, they are providing services, but it should be removed from education purposes.

A tax committee looked at the issues and made its recommendation to eliminate the Machinery and Equipment tax for public education. The Treasury Board examined it, and O'Brien recalled that Jonson, Dinning, and Steve West decided that it was a good idea, that it could be kept simple, and finally, that they could do everything that they thought needed to be done in 1994 (i.e., that the government could collect 100% of all taxes for public education, redistribute the revenue on an equal basis, amalgamate school districts, and change school board governance structures).

O'Brien concluded by proposing that the provincial government should again make local school boards, superintendents, principals, and the ATA accountable. One of the ways to do that is to put some form of taxation such as a supplementary requisition on residential property back into school boards' hands. He suggested:

> You've got to figure out a way of doing that, I think. I guess the question is, Are we going to get an Education Minister and a Premier and a government in this province in the foreseeable future that are prepared to invest the political capital required to do that?

Dr. Jim Hrabi: Associate Deputy Minister of Education (1966-1987)

After contacting Dr. Jim Hrabi at home, gaining his agreement for an interview, and delivering a number of reports to assist him in preparing for the interview, I returned to his home on February 27, 2004, at 2:00 p.m. to interview him. He had prepared written answers to all of the questions that I had left with him earlier. The interview spanned 1 hour and 40 minutes.

Dr. Hrabi began his teaching career in Saskatchewan. He then moved to Alberta, where he took a teaching position, followed by being appointed principal and superintendent before becoming a math consultant in the Department. Hrabi then served as an Assistant Director of Curriculum, then Director of Curriculum, and, finally, Assistant Deputy Minister in the Department for the last 16 years of his career in education. He retired in 1987.

As the interview began, Dr. Hrabi informed me that the term *fiscal equity* was not used a great deal but that *fiscal equalization* was more in vogue during his tenure in the Department. Fiscal equalization, he recalled, had two dimensions. The first was to reduce the emphasis on supplementary requisitions for local school districts, and the second was to attempt to equalize the revenue derived from supplementary requisitions.

The expenditure side of fiscal equalization involved three aspects. One was operational funding, which was an attempt to meet the needs of students; and the other two were often neglected for consideration as areas of fiscal equalization. These included grants for the provision of school buildings and for the transportation of students.

Hrabi recalled that, interestingly, the 1975 Report of the Minister's Committee on School Finance had as its primary goal equalization of opportunity. The secondary goal was fiscal equalization insofar as it was compatible with the equalization of opportunity:

> Equalization of opportunity is easy to say, but immensely difficult to achieve when you consider that you're talking about children who may be brilliant, may be of modest ability, or may be of moderate ability, and when you're talking about children who are in an urban setting and children who are in a rural setting and children in a very sparsely settled rural area. A third variable, of course, is the fact that we had jurisdictions which had such varying assessment bases. So the notion was simple, but achieving it was very, very difficult.

The 1969 Report of the Minister's Committee on School Finance (Alberta Department of Education, 1969b) was critical of the SFPF that had been introduced in 1961 under Minister of Education Anders Aalborg. One of the committee's concerns, Hrabi said, "was that the Aalborg program didn't define an educational plan, so it set about defining an educational plan through the developing of what is called a Class Room Unit grant." The main thrust of the report was to provide funds to school districts for a teacher-based formula that reflected a classroom unit of 25 students.

The CRU grant used a method of truncation that provided funds for set units of students of 13 for half a unit and 25 for a full unit of funding. It did not cause a problem for large school districts because of their large student populations; however, small school districts with small schools and small classes suffered. Hrabi asked, "What do you do with 10 or 12 kids?" Such small groups of students were not enough to provide funds for a classroom with a teacher, and yet the school board had an obligation to provide an education to students in this setting. This was one of the criticisms that arose because of the 1969 change to CRUs.

In 1972, after the PC government took power from the Socreds, under Minister Hyndman the SFPF moved from CRU funding to school boards to a per-pupil funding formula. Elementary student counts received a weighting of 1.0; junior high, 1.2; and high school, 1.8.

Hrabi contended that a reason that the committee was established "was because the supplementary requisition grants had started to increase quite rapidly in the late 1960s." This increase was caused when the government introduced the SFPF and provided school boards with only a foundational amount of funding to operate. School boards did not find this formula sufficient to support program obligations. As a result, they requisitioned increasing amounts of revenue through property levies. From 1969 onward, school boards were not allowed to increase the supplementary requisitions past an amount set by the government without going to a plebiscite. Bob Clark introduced the measure when he served as Minister of Education. It was one of the features of the 1969 Finance Committee report, in which school boards' supplementary requisitions were essentially rolled back. However, the government increased funding to make up for the rollbacks.

Further changes came in 1972, in Hrabi's recollection, to the government's funding of education when it introduced Small School and Special Education Grants.

They helped to address the fiscal equalization issues addressed in the 1969 recommended changes. The EOF was also introduced; however, from Hrabi's perspective, this fund did not address fiscal equalization, but rather program enhancement.

In 1972 came another significant change:

> Instead of a plebiscite, school boards could pass a bylaw just as they had to do to raise debentures, and interestingly enough, that freed up school boards financially. Research showed there were either 18 or 20 bylaws introduced; every single one of them passed.

Hrabi recalled that "in 1975 . . . it was clear that one of the thrusts of the program, as Lou Hyndman left education and Julian Koziak was appointed minister, was to equalize elementary, junior high, and senior high funding over a period of time." Another initiative that focused on elementary education was the EOF, but it had little to do with equalization, according to Hrabi, despite my telling him that others whom I had interviewed had a different opinion.

Hrabi recalled that when ECS began to be discussed during Minister Hyndman's term prior to the PCs' election in 1971, "There was a tremendous amount of controversy surrounding it. As a result of the controversy, [Minister Clark] commissioned Wally Worth to do a study, and his study was acted upon." Following Worth's report, in 1974 the government began to fund a half-day program for kindergarten-age students under the ECS program. According to Hrabi, "There were some fiscal equalization issues that were looked at." In addition to this program, the Small Schools Program was enhanced and a Declining Enrolment Grant was introduced. The SFPF levy on farmlands was removed in 1975. Hrabi explained, "This decision has nothing to do with equalization. It had lots to do with the availability of lots of money and with providing municipalities with more tax revenue." In 1975 the restrictions were removed on the amount that supplementary requisitions could increase.

Equalization through the provision of grants was a very complex issue, Hrabi recalled. In 1975 the Minister's Advisory Committee on School Finance had a concern about this topic that "resulted in an educational price index study being done as a way of attempting to come to grips with what things actually cost out there." Another committee suggestion was that because school grants were very complex, they should be simplified. "Simple solutions," Hrabi said, "cannot easily solve complex problems." That was the case in 1975, and it is still the case today, in his estimation.

Delivering special education funding is one of the most complex issues of all, according to Hrabi. The problems that need to be addressed are, "first, in identifying what people belong in which category; second, then identifying the amount of funds that need to be provided so that programs can be provided for these children." Hrabi wondered, "Nobody wanted to categorize children, but how on earth could you do this without categorizing them? I don't think they've solved that problem yet today, either."

From 1975 to 1980, Hrabi recalled, two things occurred. First, the supplementary requisitions skyrocketed; and second, because there was all kinds of government money available, both the SFPF grants and regular grants increased substantially but did not match the increase in supplementary requisitions. It was hard to even come to grips with these huge increases. Therefore, because supplementary requisitions skyrocketed, "fiscal [fiscal equity] went down the drain." During that period a Supplementary Requisition Equalization Grant was introduced for school districts, which helped them to reach the goal of fiscal equalization on the revenue side.

Hrabi reported that the 1982 Minister's Task Force on School Finance dealt with two issues, fiscal equalization and the relative share of provincial and local funding for public education.

When Dr. Bosetti was appointed Deputy Minister, the Minister's Advisory Committees on School Finance went out of vogue, according to Hrabi. Instead, Bosetti often consulted with various groups, but not within a formal structure. The Department became interested in the MFP, which emphasized planning and evaluation. Pupils, teachers, programs, schools, and school districts became the focus for evaluation.

The 1982 Minister's Task Force put a tremendous emphasis on fiscal equity. That emphasis has been there ever since, according to Hrabi.

The Department shared an internal discussion paper with school boards in the 1989-1990 school year. "The Alberta government made a proposal that would equalize all revenue from commercial property," Hrabi said. He had retired but, through his consulting business, he had had the opportunity to read it. The idea was for the government to put a mill rate on commercial property and pool the revenue, which was to be distributed through SFPF grants. Under the proposal, school boards would retain the right to tax residential property. However, this proposal was not adopted by the government at that time because of the large dominant school boards, mainly those in urban areas, did not like the idea. The government did not have the will to implement a corporate pooling scheme, and a number of small boards that realized little or no revenue from corporate taxation were in favour of pooling the corporate tax revenue, but they did not have the political clout to carry a vote against the larger and wealthier boards.

Both commercial and residential property revenue was pooled in the new fiscal framework brought down by the government in 1994 without a consensus from school boards that no longer had access to a supplementary requisition. It solved the fiscal equity issues with respect to revenue on the taxation side of the equation, Hrabi commented, but he did not believe that it addressed the equity issues on the grant side of the equation for funding school boards. These likely remain, in his estimation, because the issues around funding students equitably are very complex, and simple solutions cannot resolve them.

School facilities funding determined a level of equity for school boards, whether it was with the quality of the facility available for students or the program that could be offered. This area of facilities was turned over to the Infrastructure Department with the 1994 decision. Hrabi raised the question, “How would Infrastructure do that?” to provide facilities that reflected curriculum designed by the Department of Education. He saw it as a loss for students wherever upgraded or new facilities were needed. Education had the best ideas on how to design schools, not the Infrastructure Department.

Transportation had always been a matter of concern for the Department when it tried to achieve equity for school districts, recalled Hrabi. If grants are not provided for transportation in an equitable fashion, that has an impact on fiscal equalization. This is the same for school buildings. It was necessary during his time with the Department to update School Buildings Grants to achieve equitable funding in this area. Adjustments to these grants, both transportation and school building, relied on the findings of a variety of studies that the Department completed.

The government's access to increasing revenues from oil and gas royalties during the 1970s was certainly a significant factor in its efforts to address equalization and program decisions. This was a factor that encouraged the government of the day to exercise the political will to make the changes that it did. Hrabi contended:

> When you got to the early '80s you reached an era in politics, in my view, that had never before been reached, and that is an era of vocal, capable interest groups with contradictory goals. I'm not talking about only in education; I'm talking about in the whole social network, and media plays an immense role.
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> Whenever government makes a decision since the 1980s, the media knows exactly who to go to in order to get a quote, and the quotes are inevitably negative to government programs. It's a very difficult circumstance and requires a lot of intestinal fortitude for a government to proceed in a particular direction. In my view, politics was much simpler in the '60s and '70s and very early '80s.

Hrabi saw the rollback of funding in the 1990s as "almost a brilliant notion. It was revolutionary." The rollback's impact and support from the public could not have been predicted to gain such a positive reception among "the crucial people involved, like teachers, doctors, nurses, and civil servants. To find the will to reduce their income by 5% before taxes is just a major, major kind of initiative, in my view." Hrabi's response to my question, "Did the definition of fiscal equality and equity change during your time with Alberta Education?" was, "The definition? No, I don't think the definition changed. Operationally, it was essentially the same goal. The goal was equality of opportunity." On the other hand, he said, "The methods of delivery of grants changed, but the goal didn't change. The method of achieving it changed." He then listed the grants that had changed or were introduced, including the move from CRU to the per-pupil, Small Schools, Small School Jurisdiction, Special Education, ECS, Equity, and Supplementary Requisition Equalization grants. Although these were fine-tuned all the time, the goal did not change.

There was no noticeable change in the goal of fiscal equalization and equal opportunity, in his estimation, from the Socred government to the PC government. Hrabi recalled that these two goals were introduced in the 1950s and 1960s and remained paramount for the government at least until the time that he retired. He believed that the basis for these goals was probably introduced well before the Socred government took office in 1935.

The 1988 School Act, which reportedly put the student at the centre of the education enterprise and made the student's access to education a goal, did not change the delivery of education after it was proclaimed. I asked, "Did the Act have a significant impact on delivering equity for the student?" and Hrabi replied that it did not:

> Whether you're gifted or of modest or moderate ability, whether you live in urban Alberta or rural Alberta, whether you live in a sparsely populated district or not, and regardless of the richness of your district, I don't think that particular concept or goal of equity changed much.

The changes to the fiscal funding framework in 1994 made a significant difference and achieved fiscal equity on the revenue side of the funding of public education, Hrabi claimed. When he worked in the Department,

> We kept tinkering with the revenue side. As I say, there was this plan in 1989 or '90 which wanted to enhance fiscal equity further but did not happen, and then of course in '94 the revenue side was done.

Taking over all of the corporate and residential levies for education and pooling the revenue for redistribution to school districts accomplished a goal and achieved fiscal equity on the revenue side. Hrabi thought that if the residential property taxation for education had been left the responsibility of the local school boards, it would not have affected fiscal equity very much because

> the residential assessment per child likely isn't much different from one school district to another. The big problem was the revenue from commercial assessment and Electric Power and Pipe Line assessment was not close to being fair until it was pooled in 1994.

When I asked him what measures the Department's administration took to ensure that school jurisdictions and students across Alberta achieved fiscal equity, Hrabi replied, "[There] . . . is no way to ensure the achievement of fiscal equity." So many variables affect education that any formula can achieve equity with consistency over time:

> The real measure, the ideal measure would be, is each student's potential being realized to the maximum regardless of where they are? To try to do that you can identify proxies and you can measure the proxies, and you can then assess whether what you're doing is having an impact. But you will never get to the point where you'll ensure equity. It's just simply too complex.

Hrabi revealed that in his experience the Department had attempted to achieve goals of equity for students even though it knew that achieving the goal was never possible. However, it was something to continue to seek.

Hrabi recalled the first cuts to the education budget in 1984. The Department was faced with rolling special education funding into per-pupil funding because the assumption was that the incidence of special education was equal across all school jurisdictions. It quickly became apparent that this was not a valid assumption, according to Hrabi. For example, one jurisdiction might have had no blind students, whereas another might have had three students who were blind. The Department "came quickly to the realization that you can't simplify like that for the seriously handicapped." This was not the case with mild and moderate disabilities:

> You can reach the conclusion that . . . moderate learning disabilities are likely spread universally among the population, so you can include those into the per-pupil funding formula. But the incidence of serious handicapped kids is not spread equally across the jurisdictions. When you create larger jurisdictions, like they did in 1994, then these assumptions about incidence have greater validity.

Another of Hrabi's observations was that parents with children who have special needs and are able to move gravitate to larger centres where, the parents believe, services are more readily available for their child.

When I asked whether the Canadian Constitution had any influence on fiscal equity, Hrabi replied that it had, particularly for Catholic school districts. He added that the Alberta Act had an impact as well. Going back to the introduction of the SFPF, he explained that it was a move on the part of the government that had a positive influence on Catholic school districts. Prior to this time the Catholic school districts had been "as poor as church mice" and survived only because of "low-paid religious staff."

During the 1970s a new battle presented itself in school districts that tried to gain access to the commercial assessment. Exactly how this assessment was to be apportioned between the Catholic and public boards was the contentious issue. Discussions were emotional and vocal. Hrabi's theory was, "Had it not been for the constitutional protection of Catholic school districts I would not have been surprised to see the 1994 decision simply wipe out school boards."

Dr. Bill Duke: Assistant Deputy Minister Education (1970-1990)

I contacted Dr. Duke by email to arrange for an interview. This was followed by a telephone call to his home in Victoria, British Columbia the evening of January 22, 2004, to conduct the interview.

Dr. Bill (William) Duke began his teaching career in 1956 as a school principal in Edgerton, Alberta. He joined the Department of Education as the school superintendent of the High Prairie School Division in 1963. Subsequently, he worked as a high school inspector from 1965 to 1968, after which he took an education leave to pursue his doctorate. While Duke undertook doctoral studies at the University of Alberta, he worked on projects related to the research needs of Alberta's Department of Education. Duke returned to the Department in 1970, where he served in a number of capacities, including the Assistant Deputy Minister of Finance and Administration. He retired as Assistant Deputy Minister of Program Delivery in 1990.

As the interview began, Duke spoke to the list of definitions that I had provided. He said that politicians typically do not think in terms of definitions, but rather in terms of issues and problems about which they hear, and they respond to them through policy and legislation development. "The definitions are for researchers and academics," he said, "and essentially, in terms of putting this stuff together, one has to develop or use a language that is consistent so words and terms have the same meaning."

The original SFPF that the Alberta government established in 1961 was first and foremost an attempt to equalize taxes to support public education across Alberta's school jurisdictions. Tax burdens had increased over time prior to 1961 to the point of being onerous. Municipalities saw a greater percentage of their property tax base being directed towards resident school boards' requisitions. This concern gained the attention of the government, which responded by offering the SFPF. During Duke's tenure the government adjusted the SFPF a number of times in an effort to better address property tax pressures and the inequalities created by different levels of wealth (property tax base) from one school district to another.

During the 1970s and the 1980s Alberta Education completed regular reviews of education finance. Research also became an action for the Department of Education. Outside stakeholder groups as well as Department officials were involved in the regular reviews of education finance and related research. The topic of equality and equity for both taxpayers and students of Alberta was raised in both venues. Duke termed this the *period of rationalization*; he credited Hyndman, the first Minister of Education for the PC government who had been newly elected in 1971, with the introduction of rationalization. An example of this rational approach was the increase in the SFPF and other grants in the 1970s being tied to an escalation factor based on research; it related to the cost of a basket of educational goods and services called the *Education Price Index* (EPI). Another example was the MACOSF, which delivered comprehensive reports in 1969, 1975, 1981 and 1982; included all stakeholders in the discussion, and gathered information from academic research to address the funding issues of the day.

To add to the argument supporting the notion of a period of rationalization, Duke spoke of developing a well-researched database for education that measured such things as local school jurisdiction wealth and the needs and costs of educating the students—all components of measuring fiscal equity and equal opportunity. Alberta was a leader in such considerations among the provinces of Canada.

Later in the interview Duke contrasted the period of rationalization with the period of politicization of the 1990s and even into the second millennium. In the 1990s Duke, who had retired from the civil service, had observed the Alberta government making decisions in all areas of government, particularly in education, that were not founded on a broad base of research. Rather, the research was conducted within the Department or by MLA committees and focused on the political gains that could be made. This was in contrast to the research that MACOSF did that involved not only Department officials, but also education stakeholders such as the Alberta Teachers' Association, the Alberta School Trustees' Association, and the universities.

Duke saw Hyndman as a key figure in the pursuit of equity on all levels. Although other Ministers of Education after Hyndman had made contributions to equity in education, Duke asserted that Hyndman made the greatest inroads into establishing equity for taxpayers and students. It was one of the missions that Hyndman had hoped to accomplish while holding elected office.

In 1975, just weeks before the provincial election, Duke recalled that Hyndman approached him to say that the government needed to create a financially level playing field for the revenue that school boards were able to access. Over the next 30 days Duke did nothing but design a new supplementary funding program; it became known as the Supplementary Requisition Equalization Grant. He recalled, "Hyndman called it the *fair-share plan*." The funding available within the budget line for the new grant began "at a modest 11 million. But what it did, it filled the valley [of low funding where the poorer school districts were]. So, going back to definitions, Lou really worked on the notion that equity was fairness."

Duke said that within this period the Department changed the funding arrangements on an ongoing basis. There was strong support from the stakeholder groups, but he did not see their involvement as political. The databases that had been developed were accepted as tools to study different derivatives of equity. He explained that because the Department had the tools and was able to acquire data on the financial needs of school jurisdictions, it was able to determine the costs and needs as well as the educational tax burden of each jurisdiction. From this the education finance plan was developed.

"So you go into equality of funding; what does that mean?" Duke asked. Equal grants to school jurisdictions created a "a bit of an approximation for equity"; however, equality as equity assumes that both the needs and the cost of students are the same. That is not a true statement, and it does not meet the expectation of equity, Duke remarked, He concluded that "what you have to do is differentiate these factors to address the fact that costs in certain parts of the province differ markedly, and that Medicine Hat's utility costs are about one sixth of what they are up in Peace River."

The Department's research revealed a higher per capita population of deaf children in the Edmonton area than in Southern Alberta. Duke asserted, "The primary reason, of course, [was that] the School for the Deaf was in Edmonton, and it attracted parents with children with this particular need." To consider meeting similar special needs for other geographical areas, because the need varied across the province, grants began to be offered to school jurisdictions to address the needs in the late 1970s. This made the finance formula very complex. Block funding was simpler and had more political acceptance; however, it "doesn't differentiate to the degree that perhaps one would like."

According to Duke, fiscal equity can be considered the first approximation of the equality of educational opportunity (MACOSF (1975, p. 5). To achieve this equity, the educational needs of students had to be addressed, which was accomplished through differential funding designed to benefit individual students. On the other side of the formula, addressing the needs of students required an associated cost borne by the ratepayer, which resulted in a tax burden for the ratepayer that had to be distributed across the province in as fair and balanced a manner as possible.

By improving the way that revenue reached school districts to meet student needs at a reasonable cost and distributing funding in a fair manner shared by ratepayers and the provincial treasury, Duke recalled, the finance formula was refined to include that point in the early 1980s. It was considered the most sophisticated in Canada. He knew this to be true because he had consulted with five other provinces in the area of educational finance.

The MFP, which had been developed in the early 1980s, was, Duke believed, a move by the Department of Education towards accountability for school boards. He was responsible for creating the MFP and recalled the day that Dr. Reno Bosetti had asked to meet with him:

> He asked me to come in on a Thursday. He said, "Bill, government said they'd give us two percent if you would design something that would in effect start to improve accountability." So in two days I came back with this idea of a Management Finance Plan that would in effect move in that direction, and of course it caught on, and next thing you know it was a major item. Lougheed then

> said to the rest of the government, "You guys come up with something like education has."

When I asked Duke whether the MFP assisted in improving equity or equality for students, he replied that it reinforced equity because it drove school boards to develop policy. As each school board developed policy, they borrowed the best policies from each other that would reflect their local governance. If one school board had a good policy, the others borrowed it, Duke recalled, which resulted in a "remarkable consistency with many of the major policies; for example, in the area of special education."

Duke spoke of his exposure to Hawaii's educational system when he had visited there to observe at their schools in the early 1980s. Hawaii had achieved fiscal equity through state funding of 100% of the revenue available for the schools. It was a dreadful system in his estimation because, in effect, the funding for students was equalized and the entire system was underfunded. School boards in effect "had an equal amount of nothing. They were paupers." His visits led to a discussion at home that resulted in the conclusion that governments need to fund public education adequately and equitably for the funding to be effective in meeting the needs of students. He cautioned that when a central government controls public education, as in Hawaii, it is detrimental to the system. Therefore, he had always been sensitive to this concern. When the Department began to discuss corporate pooling for public education in the 1980s, a concern arose that residential property tax pooling might not be far behind. Duke reported that the government's press releases assured the public that residential property taxes would not form part of the pooling of revenue sources; however, in 1995 the provincial government did pool residential tax resources across the province.

When I queried Duke about the 1994 takeover of all revenue sources for public education, including residential property tax, he agreed that the political climate had changed in the province. People "were getting so much bad news from every direction that one more missile didn't register. When things are tough, that's when you can make changes." It gave Klein's provincial government the opportunity to make the changes that they did.

The Department of Education went from a more specific and complex funding formula for school districts to a simpler one in which various funds were blocked and enveloped. I asked Duke whether the funding formula of today could be changed to improve the delivery of equitable funding, and he replied that in his estimation "block funding blunts fiscal equity . . . because it uses averaging to a high degree and, of course, averages in terms of the profile of educational need across the province. The need differs markedly from jurisdiction to jurisdiction." In concluding this topic, Duke noted that another difference today from 15 years ago is that back then the Department "would have done major studies to determine what those factors [of various needs and costs] were. I get the impression that the [Minister's] Task Forces established through the 1990s . . . didn't rely too heavily on different kinds of research."

With the 1994 reforms in education, Duke believed that fiscal equity improved significantly when the provincial government took the ability to tax property from the local school boards. During the reforms the Department and the Treasury worked in concert and did a good job of achieving fiscal equity for the taxpayer through the application of equalized assessments consistently across the province. "Those are the primary factors that need to be addressed to get to fiscal equity and then subsequently to [improve] the quality of educational opportunities," Duke said. This did not happen until the mid 1990s because the political environment was not present to carry out such change despite provincial politicians' consideration of the concept from the inception of the SFPF in 1961.

Outcome equity was the last topic covered in the interview. Duke termed this theoretical view of equity for students the *Holy Grail*. Because there are differences in outcomes for students across the province, the minister's advisory committees in the 1970s and early 1980s "were wise in incorporating [the belief into their reports] when they said fiscal equity was the first approximation of equality of educational opportunity." With the government's attempt to address fiscal equity for school boards, "at least the school boards were on a level fiscal playing field." *Vertical* equity, Duke explained, is designed to provide resources to students depending on their needs, whereas *outcome* equity provides resources to allow students to experience the same outcomes as other students. There are so many variables in addressing outcome equity that in trying to achieve outcome equity such as "community resources, readiness, culture, attitude," it is difficult to define a funding formula to achieve this goal. If the government were to attempt to achieve outcome equity for students, deciding what needs to be done would mean using school districts as pilots in projects on outcome equity. However, resources are not the consideration in such a project, Duke argued. In his experience he had found that schools with Spartan resources achieved outcomes for their students that could not be explained by resources. Student success involves a dimension other than fiscal or resource: a positive learning culture. He concluded:

> It's a very noble goal to look at equity of outcomes. You'd really want everybody to be able to learn a lot and as much [as possible] everywhere [in the province], but there are too many intervening variables that just don't enable that to happen. But it is still a worthwhile goal. But you don't want to spend too much of your time and money to achieve that.

As the interview came to a close, Duke concluded, "Horizontal equity really looks at cost; vertical equity looks at educational needs." He reiterated that Hyndman had been the person who had "inaugurated the era of rationalization." Koziak allowed the Department to refine the concept of equity that had begun to be addressed under Hyndman by introducing additional grants to better achieve a more equitable distribution of resources. In the 1980s corporate pooling came into the discussions on financing education. In 1994 Alberta included the collection of residential property taxes in the pool, which dramatically improved fiscal equity for the taxpayer. However, he stressed, fiscal equity was achieved at the expense of local autonomy for school boards. Although fiscal equity has been achieved, Duke warned, the Department must ensure that schools are adequately funded.

Dr. Russ Wiebe: Assistant Deputy Minister of Education (1985-1997)

When Dr. Wiebe visited Edmonton to work on a research study, I took the opportunity to interview him there rather than traveling to his home in High River, Alberta. The interview took place at the Sutton Place Hotel in Edmonton, Alberta, on the afternoon of January 13, 2004, at 4:00 p.m.

Wiebe began teaching in 1962 and then became a vice-principal and a superintendent, a position that he held in five different school districts. In 1985 he joined Alberta Education as a Director of the Lethbridge office, which was followed by a move to Edmonton in 1988 to become a director of the Edmonton regional office and, in 1993, the Executive Director of School Finance, Business, and Facilities. He was appointed Assistant Deputy Minister of Regional Services early in 1997, a position that he held for only three or four months until May 1997 when he retired.

Wiebe recalled that *fiscal equality* was not a term that was commonly used; however,

> equality basically meant that if you had the same set of circumstances as someone else, then you would be funded the same. . . . Equity means that if your situation is different from someone else—in other words, perhaps you have higher costs than someone else—then you will be funded differently.

Equity has the expectation of fair and just treatment, without favouritism, for everyone in a system. He argued that the word *just* means that "you get what you deserve, and if you deserve more than someone else because your needs are different than someone else's," you will be granted more based on those needs. These were the common definitions that he saw used in the Alberta education community, including the Department.

Wiebe believed that equity for the ratepayer (taxpayer) was the driving force in Alberta in the years before 1993. Across the province there were significant differences in the ability of school boards to raise tax revenue on a tax base that varied in wealth from one school district to another; this created have and have-not school districts. The government acknowledged these differences prior to 1994, and discussions had been held between school board officials and the Department over a number of years. Wiebe saw Jim Dinning, when he was Minister of Education, as a key player in trying to resolve these inequities. Dinning tried throughout his tenure as minister to bring about a solution, without success. When Halvar Jonson became Minster of Education, the issue "came to a head." Wiebe recollected that in September 1993 a meeting of the Education Standing Policy Committee of government had been called: "Different school boards were there with government members on that committee, and they were trying to figure out how they were going to sort out the whole issue of property tax equity amongst school boards." The school boards were clustered into groups, with some asking for one solution and others another. No solution was found because, essentially, the have-not school boards wanted more revenue, and the have school boards did not want to give up any of the revenue from their industrial tax base. "There was a period of time between September and November of 1993," Wiebe recalled "when everyone knew that there was no agreement, and at that time government was trying to figure out what are we going to do."

In January 1993 Premier Klein announced a major initiative to balance the government's budget and eliminate the government's debt. Jim Dinning had been appointed Provincial Treasurer in December 1992 and Halvar Jonson as Minister of Education. After the provincial election in June 1993, "Government then started steamrolling, and I use the word *steamrolling* because that's the only word I can think to describe it while I was an employee there," Wiebe said. He summarized what had happened:

> In late November of 1993 a phone call coming to our deputy minister from the minister, Jonson, saying, "We just decided how we're going to solve the whole issue of property tax equalization amongst boards. We are taking it over. We are henceforth, as of January 1st, 1994 calendar year, we are going to take over the collection of all education property tax. We're going to put it into a fund, and then we're going to use that to fund students on a per-student basis."

Wiebe was the Director of Finance at the time. He immediately started to "kick start" the process through which Alberta Education "would dovetail with Municipal Affairs to be able to implement this, because it was going to take effect in exactly a little over a month's time." The two departments worked "flat out" in trying to figure out how to carry out the task that they had been assigned. "We weren't ready for it, but that was the will of the day. The announcement didn't come until January '94, but when it came, we already had some mechanisms in place as to how we would do it," which implies some forewarning of what might happen. The decision for the province to take over all taxation related to education was, according to Wiebe "the big decider of equity in this province."

Later, with legal counsel, the government decided to back off from collecting education property taxes from Catholic school boards' ratepayers. Revenue collection was then left to the Catholic school boards, as had been the case since 1905.

In summary, two factors drove the government's decision to restructure the fiscal framework for education, Wiebe contended. One was that the government and the school boards could not reach any agreement on how the jurisdictions with rich tax bases could help those with poor tax bases. Everyone was frustrated and tired of talking about trying to bring about a more equitable solution for ratepayers and revenue for school boards. The second factor was "the whole bullish attitude of government to balance the budget to eliminate the debt, and government was on a roll":

> We're going to do it all, and we're going to hit them, and it's using the New Zealand model, the model that they brought the fellow up to talk about from New Zealand. And he said, "If you're going to do it, as Mr. Dinning said, you do the full Monty. You don't do anything half heartedly." So, consequently, that's what they did. They did that for a good couple of years. The government was extremely bullish, and I'm not saying that disparagingly. It was the mood of the day; it took a lot of guts to do it. It seemed like the public was supportive: "Go for it. We're all behind you. Balance that budget. We're getting tired of two billion dollar deficits every year." And so the government did it.

Wiebe's role in 1994 as the Director of the Finance Branch was to develop a whole new funding framework for the province, taking into account the reduction of overall funding for education. The education budget during the next two fiscal years was cut by $1 billion. Wiebe's job was to develop the new plan with the help of the Department and a committee of MLAs. The committee asked two primary questions: (a) What is common to school boards that can be funded the same from one board to the next? and (b) What is not the same that needs to be funded differentially? The process to develop a new funding framework took from the fall of 1994 to the spring of 1995 to complete, and it was implemented in September 1995. The answer to the first question with regard to what was common and could be funded equally, Wiebe recalled, was the cost associated with the core curriculum and the cost of addressing mild and moderate student needs as a common percentage of the student population. The second question drew a different set of costs that varied depending on various factors. In answer to the question, the number of severely disabled students, the number of students who needed instruction in English as a Second Language (ESL), the cost of delivering education in sparsely populated areas, and the costs associated with being located at a distance from major urban centres were examples of factors that varied from one district to another. As Wiebe and the committee studied the matter and prepared for a new funding framework, Jonson, Dinning, and the government caucus clearly communicated to Albertans that the new framework had to protect the classroom by putting "as much money [as possible] into funding that would follow the student," while limiting spending. To accomplish such funding, student transportation had to be cut back, planned operations and maintenance of school facilities had to be cut, and government-imposed caps were placed on administrative costs. Wiebe recalled, "Everywhere we could, we took money out of administration, plant operations and maintenance, and transportation, and we stuck it into instruction."

The number of school districts in the province was reduced, and the government hoped that the savings could be passed on to the classroom. Wiebe doubted whether there were any substantial savings realized as a result of amalgamations. If there were, then the measure would create more equity because the money would go to the classroom.

Wiebe defined *efficiency* as "being effective [and] using the least amount of resources." He added that students with different needs should be given different levels of funding as efficiently as possible. If funding is used equally effectively in two school systems, then it may be argued that equity is better served. For example:

> If you're funding a severely disabled child in a school, you want to . . . provide for the needs of that child in the most effective way, and generally it's driven by money. If you have a child that has cerebral palsy, "Well, we will give you $14,000. Now use that 14,000 of extra money to do what you need to do to serve the child."

Funding was not designed to reflect program costs; or at least, Wiebe said, it was very rare that it did. Block funding, which the government had used to fund education, allowed school boards and schools to decide how they wanted to implement a program.

I asked Wiebe about the differential costs of teachers from one district to another, and he replied that there was little evidence from his study of the matter that would demonstrate that average teacher costs contributed to a variation in the cost of delivery from one school district to another. This was not considered an issue that contributed to inequities and therefore did not need to be addressed, in his opinion.

With regard to whether the definition of fiscal equality or equity had changed during his tenure with the Department, Wiebe admitted, "To me, equality didn't change. I don't think government really changed how they treated people." However, he pointed out, "the whole issue of equity certainly did change" because all revenue went into one "revenue pot," and funds were given to school boards in blocks that varied according to student population. Further, he said, additional money was handed out on a differential basis for government-defined needs that varied from one school district to another.

Funding for severely handicapped students is provided on a per-capita basis, and this was how it was distributed in 1995. However, the total number of severely handicapped students who would be funded was capped, and Wiebe reported that that method of delivering funds has changed since 1995. Public pressure resulted in the removal of the cap in 1997, and Wiebe explained that the funding is based on profiles:

> If they profiled you two years ago and they said, "Based on this profile we're going to provide X amount of money. Two years later, if you have more kids, more severe-disability kids, let's say, than you had before on average, your profile will still drive the way you're funded." Profile and cap were kind of the same in a way. It limits the amount of money that would flow to any one particular jurisdiction, because government feels it has to have some sort of control as to what it puts in the budget. It can't be like a runaway horse and carriage.

In answering the last two questions—(a) How effective was the funding formula in achieving equitable funding arrangements for the delivery of education? and (b) where could the formula be improved to achieve a better level of equality and equity for each student, regardless of where they attend school in Alberta?—Wiebe believed that the funding framework introduced in 1995-1996 had worked well overall and that the framework had not changed very much other than a few "little wrinkles here and there [that were] added— . . . program funding like AISI." With the amount of money that the government had for education, Wiebe concluded that "the way it was distributed was probably, to me, one of the most effective ways for them to distribute the money they had."

According to Wiebe, "Other things have cropped up that would lead people to believe that there needs to be some changes." The area of plant operations and maintenance had been cut back severely in 1995-1996, and its functioning went into a decline. In addition, preventive maintenance suffered, in his opinion, and this is an area that needs to be addressed. Furthermore, using the sparsity formula to fund rural school boards with small schools is only partially effective and needs to be reviewed to improve equity.

Wiebe acknowledged that in the fall of 2004 the government began to introduce changes to the funding framework for education. One of the areas that would not be reopened is residential property taxation, which again will become the responsibility of local school boards. Even though the Alberta School Boards Association has pushed for this, the government has rejected the idea because of "a lot of school boards, the have-not boards, that did not want to return to the pre-1994 day." Some school boards do not want to let the government "off the hook" for funding all of education, and moving towards school boards' regaining some taxing authority would do that. Reframing taxation and suggesting that taxes might increase would likely not sit well with residential property owners. Wiebe said, "All the municipalities, especially the large cities, were adamantly opposed to school boards' getting back into the ring to collect taxes, and that won that day. The municipal leaders won the day." He concluded that even if the school boards were limited in the amount of property tax they levied, it would have the effect of creating inequalities amongst school boards.

Equalized assessment was "particularly important to education when education used to only collect money for the SFPF." The tax base from richer school districts contributed more per capita to the SFPF than the poor ones did, according to Wiebe. When the government took over property taxes, the equalized assessment lost its effectiveness, and many problems arose. The Municipal Affairs Department switched to a market value assessment; however, in spite of continued complaints from some property ratepayers, Wiebe saw the current system as far superior.

The last thing that Wiebe said as the interview closed was,

> You can't really address all equity issues. You can do your best to achieve equity, but there comes a time when people have to realize that there are certain circumstances that they're living within. Kick in and live with that. It's not a bottomless pit of money. But you do the best under the circumstances.

The interview ended after about an hour. Dr. Wiebe offered to answer other questions if they arose later.

Mr. Steve Bemount: Executive Director (1986-present)

The interview with Mr. Bemount was held on March 3, 2004, at 10:00 a.m. in his office at Alberta Learning in Edmonton. The interview continued for two hours and provided a rich amount of information on fiscal equity and its effect on equal educational opportunity.

Steve Bemount began his career in education in 1974 as the Secretary-Treasurer for the school board in the County of Athabasca. In 1985 he joined the Department of Education staff in the School Business Administration Services Branch led by Steve Cymbol. The branch was "responsible for working with school boards on the business-management side of running a school system." In January 1990 he became the director of that branch when Steve Cymbol became Assistant Deputy Minister of Regional Services. Bemount remained the director and held the position until October 1997, when the Department's Legislative Services Branch became leaderless and was amalgamated with the School Business unit. The new amalgamated branch was called School Business and Legislative Services, and Bemount was appointed director to lead the new unit.

In May 1999 the Department of Education was amalgamated with Advanced Education into Alberta Learning. Then in February 2000 Bemount was appointed Executive Director of the Operations and Services Sector, which included responsibility for the areas of Legislative Services, Financial and Administrative Services, Fiscal Management and Accountability, Corporate Records, and the Learning Resources Centre. Bemount still held the position of executive director at the time of the interview.

Bemount could not recall any significant changes to financing public education during Betkowski's tenure as Minister of Education, particularly in contrast with what happened in 1994. The new School Act of 1988 had little or no impact on equity or equality for students or taxpayers, in his estimation.

With regard to internal discussion in the Department, Bemount recalled that the term *equitable opportunity for students* was used most often in connection with *student equity*. It was understood, however, in terms of funding students to give them the opportunity for an education that "you can lead a horse to water, but you can't make him drink."

When Bemount joined the Department, he learned that the revenue and resources available to educate a student varied across school districts in Alberta. For example, Berry Creek School Division was responsible for about 150 students; the revenue available for each student was over $20,000. Another example was Northland School Division, where the cost of educating a student was about $14,000, well in excess of the average revenue of about $4,100 for each student in the province. School boards spent the revenue that was available to them. Bemount said that, in his experience,

> Somebody gives us more money, we spend more money. Surprise. We don't say, "Well, I'm going to spend the same amount I always spend, and I'll just give the rest away to the kids or just stick it in the bank and leave it sit there because we don't need it." We do more things than we were able to before. We ended up spending it.

There was an extraordinary spread between the school districts with the highest revenue available and those with the lowest. Another component of the financial picture for school boards was the mill-rate spread between the highest in the province and the lowest. This produced inequities that were very noticeable. In order to compare school districts' financial health across the province, one of the Department's comparators was a measure called *net mill rate*, a figure that Bemount said provided a comparable measure of the tax burden among school jurisdictions, but not among municipalities. He explained:

> The supplementary requisition was made up of the EP and PL (Electric Power and Pipe Line) and the net requisition. If the net requisition, excluding EP and PL, is divided by the equalized assessment, which also contains no value for EP and PL, you get the net mill rate.

> Net mill rate is a comparison of tax burden between the school jurisdictions, and in 1993, the last full tax year unencumbered by the government, where the system functioned by itself, I think those net mill rates ranged from about 3-point-something to 20.
>
> If you then divided a school jurisdiction's net mill rate into the amount of its EP and PL revenue, you got a calculated value of equalized assessment for the EP and PL at the local level of tax burden. When that calculated equalized assessment value for the EP and PL was added to the regular equalized assessment, you came up with the jurisdiction's adjusted equalized assessment.

However, in comparing equity from one school jurisdiction to another, the adjusted equalized assessment became the important number. For example, Bemount said, the adjusted equalized assessment put an assessment value on the EP and PL revenue that the school board could spend. When this revenue was calculated on a per resident student basis, one could compare it with other school boards per resident student costs.

Because the School Act has required since 1970 that every student be considered some board's resident, then every student must be educated by some school board. Bemount emphasized, "There can be no kid lost in the shuffle. . . . The school jurisdictions have a legal responsibility to provide educational services to their resident students." This created a political scenario that "troubled the politicians because each student had a school to go to, which was supported by a school district's revenues which included the revenue that varied from one district to another." The problem entered the political arena if parents wanted their child to attend another school district. Prior to 1994 that would mean the receiving school district, if it was agreeable, would assess the designated home school district a tuition fee equal to that of the receiving school district's investment in local requisition per resident student. If the designated home school district saw that amount as more than it was spending, it would be reluctant to pay the tuition fee. In this case the parents had a choice either not to enrol their child in the receiving school district or to pay the tuition themselves. Parents, for the most part, did not like these choices that they had to make when a school board did not want to pay the tuition and often consulted their MLAs. When the matter came into the provincial MLAs' offices prior to the changes brought about in public education in 1994, the MLAs conveyed their displeasure with the existing system to the Department of Education. These problems disappeared after 1994 "with full provincial funding, of course. Once all the money was following the kids, you could go where you wanted to, space permitting."

Tracking resident students began in the late 1970s, Bemount recalled, because "the government introduced grants in lieu of taxes for provincially and federally owned properties that paid no property taxes," and soon after this, in 1977, for properties owned by corporations that had not filed a declaration for either public or separate school jurisdiction support:

> The separate system had the ability to file a notice requiring the corporation to do their notice by a certain time; otherwise, there was a formula that kicked in and initially split the corporate assessment between the public and separate boards in proportion to their declared assessment. It started being in proportion to their declared assessment, but soon reverted to being split in proportion to resident students, just like the grants in lieu of taxes.

within two years the government changed the *School Act* so that "undeclared corporate assessment was split on the basis of resident students." Thus student counts became important to school boards because they depended on the count for their revenue from government grants:

> There were forms to fill out and send into the province on the split of this assessment. . . . It wasn't the total resident students for this little separate district compared to the total resident students of the larger public division. That's not apples and apples. It was the total resident students of the separate district in comparison to the co-terminus public district that was in that division, so you're using the same geographical area to compare resident public and separate resident students.

Bemount recalled that this presented another problem that soon resulted in the formation of new separate school districts, as allowed by the School Act, to capture revenue from corporations within the newly formed separate school district. Revenue was lost by the public school jurisdiction and gained by the new separate school district, which created another financial and political problem for the government. One such example was the Castle Roman Catholic Separate School District that formed in about 1987 around the Scottford Refinery, a short distance from the City of Fort Saskatchewan. According to Bemount, "The provincial average adjusted equalized assessment in '93 was about $192,000 per resident student." Castle RCSSD was raising about $1 million through supplementary requisitions for each of its students:

> They were pumping that tuition . . . into [the] Fort Saskatchewan Separate School District. That was technically contrary to the statute because the statute required . . . that a board could not charge more in tuition than the net average cost of providing the service. Fort Saskatchewan Catholic was charging, in effect, about a million dollars a kid to care for them. So there are all kinds of little examples of where the system wasn't working.

On August 31, 1993, Alberta had 181 school boards in the province; approximately 40 school districts did not operate a single school, and in August 1993 Minister Jonson imposed amalgamation on 35 of these 40 nonoperating boards. "At that point, Castle was amalgamated with Fort Saskatchewan, and the assessment was blended into Fort Saskatchewan's assessment," Bemount reported. Jonson's action of amalgamation, combined with the later amalgamations, reduced the number of school districts to approximately 60 and eliminated the political and financial problems associated with districts such as Castle.

Besides the amalgamations, in a court case in early 1994 that Bemount remembered, a parent took the Aqueduct Roman Catholic Separate School District to court because Aqueduct had directed the child, who was resident in Aqueduct, to attend a public school in Brooks, Alberta. This was the result of the County of Newell's, a relatively wealthy school district surrounding the Town of Brooks, closing a rural school west of Brooks and redirecting its students to another rural school east of the town. Several of the impacted parents objected to moving their children to the newly assigned school and wanted them to attend the closer schools operated by the autonomous public school district in Brooks. The county declined to do this, and the response of some of the parents was to form Aqueduct Roman Catholic Separate School District. A number of parents declared themselves Catholic so that their children could attend their school of choice in Brooks.

A Roman Catholic parent moved into Aqueduct from Saskatchewan and wanted his or her child to attend a county school that was closer than the one in Brooks. Because the tuition for the school in the County of Newell was more than that in the school in

Brooks, the Aqueduct Catholic School District refused the parent's request. Bemount explained, "The court made a very interesting decision" by declaring that the purpose of forming a separate district was to provide a separate school to resident students; it was not to redirect Catholic separate students to a public system located somewhere else. Further, the judge ordered the Aqueduct Separate District to open a Catholic school by September 1, 1995, or the district would no longer exist. Aqueduct had only a few months to abide by the judge's directive. At about the same time, Jonson announced that the province would take over the provincial tax base for education and redirect the revenue equally to school districts on a student-by-student funding model. Jonson also gave school boards until August 31, 1994, to choose other school districts to form a partnership and prepare to amalgamate. Bemount recalled that, he personally, had met with the few members of the Aqueduct board at a kitchen table, and then with each one of the other small school boards in a similar situation of having formed for directional issue rather than to operate a separate school. Bemount told these nonoperating school boards:

> Okay, fine, here's the court decision. The minister's going to do away with you on September 1. Now that the government has committed to tax dollars following the student, your original reason for forming has been addressed. I would encourage you to get in front of that train and voluntarily ask the minister to dissolve you, because you no longer need to exist.

In May 1994 Jonson presented in the Legislature a bill that would take the tax base away from school boards. The bill clearly stated

> in the prognostications that now students will be able to go, space permitting, anywhere they wanted to go to school, and the money would follow. As space was not an issue in rural Alberta, I persuaded them to voluntarily pass resolutions that would dissolve their school districts.

Another, concurrent factor affected how the government dealt with francophone school districts, and it was reflected in the Mahe decision, Bemount recalled. Of the 40 nonoperating school districts, 35 were amalgamated, and the jurisdiction provided services to the students. Four of the five nonoperating school districts that remained were separate districts that had formed to be able to direct students to a particular school and then voluntarily dissolved. St. Isidore Public School District, located close to the town of

Peace River, took advantage of the provincial legislation put into place after the Mahe decision and became the Northwest Francophone Authority Number One.

Bemount spoke of three different measures of equity: (a) adjusted equalized assessment per resident student, (b) net mill rate, and (c) supplementary requisition per resident student. He identified three questions that can be asked to determine these three measures:

1. How much assessment do you have available to you on a per unit basis—a per student basis?
2. How much effort, how much burden are you placing against that assessment? and
3. As a consequence of that, how much actual disposable resource have you generated per student in comparison to other boards?

All three measures are interesting comparators for determining the level of equity that was achieved in public education from one school district to another. When the legislation was being prepared, Bemount commented, the government considered these measures of equity and the related questions. There was also a related concern with the inequity that politicians observed in school jurisdictions where the tax base was not adequate to deliver the requisitions for education unless the mill rate was much higher than the provincial average. When the politicians compared this to the school jurisdictions with a large tax base, many of them wanted to address the inequity. However, not all of the MLAs shared this opinion. Bemount recalled that some school jurisdictions that had resources that were adequate and comparable to those of other school jurisdictions chose, because they were ultraconservative, not to levy supplementary requisitions at as high a level as those of the other school districts. The result was a school district that had fewer resources available because it collected less revenue; it was not because of the taxpayers' abilities and wealth. These school districts appeared to be poor but were not; however, their schools had fewer resources than others did. Prior to 1994 the County of Ponoka was one of the districts that had a wealth base to tap for resources but chose not to do so. The County of Lacombe had a similar wealth base and chose to tap the resources to a greater degree. These two districts sat side by side, and it appeared that Ponoka was poor when it actually was not. Ponoka had a mill rate of 8; the provincial average was around 11. Both counties were within the boundaries of Jonson's constituency. When the new funding framework for school jurisdictions was introduced in 1995, the discrepancies between school boards such as the Counties of Ponoka and Lacombe levelled out, Bemount said, "to the degree that [they] shared the revenue in a reasonable way."

The will of school boards to tap into the available tax base and of taxpayers to pay could be demonstrated, Bemount said, by looking at some of the school boards with higher revenues. For example, on average, the County of Strathcona and the two Fort McMurray school boards were wealthier boards in the province and could have eased off on their property tax requisitions but did not. Instead, they requisitioned according to high mill rates that averaged around 14.

One of the issues that the government and school boards had discussed with regard to inequities was the corporate assessment. Some school districts had access to rich revenue sources from taxing local corporate businesses and from EP and PL revenues, whereas others had very limited access to such resources. Such marked inequities in the resources available to school districts had been presented to the government as problems to be resolved.

Minister Betkowski proposed pooling the revenues from corporate taxation across the province of Alberta. Her four proposals included corporate pooling and the full equity grant. The existing equity grant was continued, and corporate pooling was not supported. Her lack of success with corporate pooling, Bemount asserted, was similar to that of her successor, Jim Dinning. Bemount recounted that he had accompanied Dinning around the province trying to gain the support of school boards for the idea of corporate pooling and a concept that Dinning called the Educational Trust Fund. The province would pool the corporate and EP and PL education taxes and redistribute them in equal dollars per student. There was never consensus among school districts and a similar lack of support among the government's caucus members during the time that Betkowski and Dinning served as Ministers of Educations. In fact, Bemount reported that even after Dinning's effort to promote corporate pooling, "The boards were extremely political, and they split the Legislature right down the middle based on where the MLAs came from," whether they were from a wealthy or a less-well-off jurisdiction.

Bemount recalled that nine school boards challenged the government through the courts, alleging that the funding framework of 1993 had caused severe fiscal inequities that disadvantaged poorer school jurisdictions in relation to wealthier jurisdictions. Although the court case never made it to a full hearing because the court deemed that the nine school boards lacked the jurisdiction to make the complaint, the impact of the challenge came at a time that Bosetti knew that similar challenges were occurring in Kentucky. Bemount suspected that the challenge might have influenced Jonson, the minister, and Bosetti, the deputy minister in the measures that they took to Treasury in the fall of 1993 when the initial decisions to change the funding structures for education were made.

When I asked Bemount what happened after Dinning's departure as minister until Jonson announced that the government was taking over the collection of property tax revenue for public education, he did not know why the caucus had been deadlocked on the issue of corporate pooling, other than that some of the MLAs were afraid of not being reelected if they supported corporate pooling. "Some bright person (it remains shrouded in mystery) came up with the bright idea of, . . . 'If we can't agree on [corporate pooling, then] let's just do what's happened in [the majority of] other provinces." Bemount suspected that Dinning, Bosetti, and Jonson took an attitude of, "Let's just take all the assessment. . . . If you can't agree on this corporate pooling, then let's take it all." Once the decision was made to pool all of the education revenue, Jonson took action quickly, Bemount recollected. With two weeks notice a draft bill was prepared and delivered to the Legislature for debate:

> All the MLAs in caucus seemed to see this new approach as face saving, that they hadn't given up on the previous position. This was a totally new idea. The province would manage the total equity, the total funding. Full funding by the province, that sounds real good.

Once this news broke, the educational community began to argue that the funding was not adequate. Bemount lamented, "This is the cry of both those who perceive themselves as having been disadvantaged by the new funding framework and those who have improved funding. The money is never enough to do all the things they would like to do." Adequacy, in the minds of the public, specifically the education community, will never be addressed, because if schools receive more, they will spend it and then make other demands. "If we got this much"—Bemount relayed what he believed the educational community thought—"we've got nothing to lose by whining for some more. . . . Who knows what the right number is? It's elusive."

I asked Bemount what he thought were the points in time during his tenure with the Department when equity changed. He replied that the first was in 1985 when equity grants were "revamped into a new equity grant. This introduced the concept of a negative fiscal capacity component that would offset positive entitlements under the other two components of sparsity and distance." The second time was in 1994, which he called "the biggy; once-a-century kind of impact." The idea of equity and what the Department and the government were seeking for the classroom and the student never changed during the adjustments in 1994-1995. Bemount believed that there was always an understanding in the Department that there would always be "differences, because a kid living up in Rainbow Lake doesn't have the same opportunity and never will for what you've got here in metro—the second language programs, the music programs, the drama programs." In Bemount's opinion, because the people who live in distant rural locations choose to live there, they should not expect, for example, the wide choice of programs and facilities found in large urban centres:

> But for the core program and basic knowledge, can that kid get the opportunity to get university entrance? . . . Equitable opportunity is . . . kind of elusive, but the concept of equal opportunity, no matter where the kid lives, was always . . . in everybody's minds.

Betkowski was successful in implementing a full equity grant. Beginning 10 years prior to Betkowski's role as minister, in 1975 nine different grants were designed to improve equity for students. These grants were for small schools and declining enrolments. All nine were collapsed into one equity grant in 1985, and the factors of fiscal capacity, sparsity, and distance determined the level of the grant to a school district. They continued until 1993-1994, according to Bemount.

The equity grant introduced in 1985 did not work well. If a wealthy jurisdiction had a very large negative fiscal capacity that more than offset any entitlements under the sparsity and distance components, the total equity grant was not taken below zero. Accordingly, a wealthy school board continued to be wealthy, and poor boards continued to be poor despite the grant. Bemount remarked that while the grant was in effect, the equity grant was not fully funded, which also kept the grant from performing to its potential.

Bemount spoke of defining equity for students: "Equity is not equal. Different kids have different needs, and it costs more to educate a kid in Podunksville than downtown Edmonton, [and] it costs more money to run a little school than a big one." How does a government manage that and achieve equity?

> You divide up equal money unequally to provide equity, so that—maybe *equal opportunity* is the correct phrase—equal opportunity results from unequal distribution of the available assets, because different people don't have the same opportunities, and you have to fill in those differences.

To achieve equity of outcomes, according to Bemount, you need "to define the outcome you're trying to accomplish before you can decide whether you've accomplished it or not." The problem for Bemount was in deciding what society would wish to be the outcome. He had questions rather than answers, and he asked, "How do we define a well-educated student? Is it defined by looking at student test scores, or is it to have . . . well-adjusted, contributing-to-the-community, happy-family-life, stay-out-of-jail [adults]?" For students with severe disabilities, Bemount suggested that perhaps the outcome for them was a certain quality of life and level of independence.

When I asked Bemount whether returning the ability to requisition from the residential tax base to school boards would be of any advantage to the funding framework that the government used in 2004, he replied that if school boards regained taxing ability, they would seek increases whether they needed them or not. This could result in an unnecessary increase in funds just because neighbouring school districts were asking for it. New demands would be made to fill the gap because of the potential for extra funding from the residential tax base. Bemount saw this as problematic because not only were new demands being made, but also, when the government decided in the 1970s that school boards would be allowed a maximum requisition increase, the maximum became the minimum, which perpetuates annually. This was what happened and led to the changes made in 1994:

> The last three years school jurisdictions had the tax base. If you take the total requisition for the province, the requisition went up on average more than 10% each of those three years. It crescendoed up to kind of a crisis of burden, and the municipalities were all up in arms and there was a big kafuffle, which kind of drove the decision.

Bemount concluded, "If there's no fence around [local property taxes], pretty soon it grows and it grows, and the municipalities push back, and you're into an untenable political situation again." On the other hand, there is never enough money to address concerns in education.

Overall, Bemount saw the government as having been successful in achieving fiscal equity by taking the unprecedented action of capturing all of the revenue for public education and redistributing it on a more equitable basis. Although there continue to be challenges to the funding framework, he saw little reason to make any changes to the basic formula. No funding is perfect, and the current formula that the province uses is no different. The improvements needed in 2003 were considered to be more minor than major.

Summary

The officials helped to verify, but, more important, to elaborate on, the events that affected the topic of equity in public education. O'Brien brought a unique perspective because he worked in the Treasury, the department that he believed often looked at funding public education from a distance. Both Hrabi and Duke saw the financial picture from within the Department and were able to describe the models that funded public education because they were both responsible for the development of the models. Wiebe's and Bemount's perspectives were closely tied to the changes in 1995 because they were both involved in the events that led to the new funding framework that was implemented in 1995.

CHAPTER NINE:

SYNTHESIS OF THE FINDINGS

Review of Equity From 1880 to 1971

Equity in education in Alberta for the taxpayer and the student is rooted in the time following Confederation in Canada and before the Province of Alberta was incorporated in 1905. Frank Oliver attended a meeting of prominent Edmonton citizens at a local hotel during January 1881 to discuss making it possible for all children in Edmonton, including Aboriginal children, to attend school without cost. Two years later Oliver introduced An Ordinance Providing for the Organization of Schools in the North West Territories in the Territory's council. This ordinance passed into law in 1884 and gave universal access to schooling in the Territory. Protestant and Roman Catholic school boards were allowed to establish schools and were granted powers to control and manage them through teacher certification, textbooks, and the inspection of schools. This may be described as limited "equal distribution," a level of equity characterized by Alexander (1982; see Chapter Three) in which all students who have a school available to them have equal and free access to education.

In 1901 the Legislative Assembly of the North West Territories passed an amendment to the school ordinance that required all students between the ages of 6 and 16 to attend school, and no fee was levied. However, school supplies were no longer free as they had previously been under the ordinance of 1884, but exceptions were made for those who could not afford the cost of textbooks and other supplies; the ordinance allowed school jurisdictions, where necessary, to waive these added expenses. Because school was mandatory only to age 16, school boards were allowed by statute to levy a set fee on students who attended from Standard V to high school. Equality of access was provided for in legislation up to Standard V. However, rural students were less likely to attend school than their urban counterparts were. In order to encourage rural students, the territorial government provided a more favourable funding level to rural school jurisdictions when their students attended school for a prescribed number of days.

In 1901, if Catholics formed a majority in an area, their school was termed a *public school jurisdiction*. In those areas where they were a minority, Catholics could create a separate school jurisdiction with exactly the same privileges as the public school jurisdictions had. In this is found an equality of treatment under the law for school jurisdictions.

Measures were taken in the 1910s to cause funding to be equalized and encourage students to attend school. One of these, amendments to the School Grants Ordinance in 1913, assured students who attended school from Standard V to the high school level of an education free of cost to them. Another was an amendment to the tax ordinance that provided equalization of educational opportunity when the government added more support through a special grant to the schools in poorer areas by compensating school jurisdictions with an assessment below $75,000. Taxpayers saw these measures as characteristic of restitution, as Alexander (1982) identified them, because remedial fiscal programs focused on weaknesses.

Special-needs students were offered programs in a limited way at the beginning of the 1900s. Edmonton received a grant to establish a school for "mentally defective children" in 1917. Calgary was the recipient of the first sight-saving class in Alberta through the government's provision of a grant of $875 in 1930.

In 1931 the government responded to the adverse conditions that farmers had faced in 1930 with an equalization grant to school jurisdictions where the ability of property taxpayers to pay sufficient taxes to cover the cost of education was hindered because of the assessed low valuation of property in the jurisdiction. This grant made it possible for a large number of school jurisdictions to continue to operate during these financially difficult times. In addition, the Tax and Rate Collection Act made the taxation procedure for education uniform amongst school jurisdictions, which improved fiscal equity amongst taxpayers and allowed schools to remain open, an effort of "equal distribution" (Swanson & King, 1997, p. 320).

In 1936 the SC party reorganized and consolidated rural school jurisdictions into larger units of administration. Consolidation in many instances improved the opportunity for students in rural Alberta to access a broader range of programming than they would have been able to do earlier. The economies of scale worked to their advantage, particularly at the high school level. By 1943 most rural school jurisdictions belonged to one of the 50 large school divisions. These consolidations may be considered a corrective program that resolved problems caused by the government's structure of school jurisdictions. Therefore, it can be characterized as an effort in improving "equal distribution" (Swanson & King, 1997, p. 320)

Gerhart, Minister of Education, announced in 1955 that grants for education would increase to cover 50% of the operation costs of elementary and secondary education. This measure was a precursor to the SFPF.

A Royal Commission on Education was established in 1957. The resulting report of what became known as the Cameron Commission identified appropriate educational opportunity for all youth as a general concern. If a school jurisdiction was unable to finance such programs of equal opportunity, the commission recommended that the government fund the program. To improve the level of instruction for students across Alberta, the commission also recommended that, to gain a teaching certificate, teachers be required to have a Bachelor of Education degree.

The Foundation Program, which became know as the SFPF, was established in 1961, which proved to be a very significant step toward providing equal opportunity for students. The purpose of the SFPF was to offer a grant of equal value regardless of where the student attended school. The principles of the grant were that it would have an equalization factor between school jurisdictions, that the SFPF would raise local school revenues to a defined minimum level to cover essential services at current costs, that school jurisdictions would raise tax funds at a common mill rate, and that the balance of the foundation program would be secured with a provincial grant. This fund improved equal opportunity and equality for students while relieving taxpayers in poorer school jurisdictions of the burden of paying a disproportionate property tax compared to those in wealthier jurisdictions.

As a result, the recommendation from a Socred government committee on school finance in 1969 fine-tuned the Foundation Program and changed the methods of funding school jurisdictions. The objective was to provide fiscal equalization (Alberta

Department of Education, 1969a, p. 83). This was successful as long as the supplementary requisition levels of school jurisdictions remained low, but when these levels began to increase as a proportion of the total revenue collected for education, the objective of greater fiscal equalization began to be lost.

These initiatives and events spanning from 1880 to 1971 prepared the stage for the PC government's 1971 launch of another series of policies to achieve equitable treatment of students and taxpayers.

Figure 4 depicts the revenue plan for school jurisdictions in 1969. The SFPF included funds from general provincial revenue as well as contributions from a 28-mill equalized assessment. This figure and those that follow are not exact and proportional depictions of the amounts of funding in each category; rather, they are models for the purpose of comparison that describe the broad parameters of the fiscal structure that supported public education.

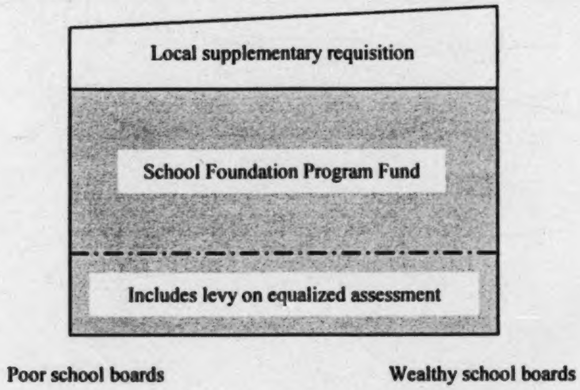
Local supplementary requisition
School Foundation Program Fund
Includes levy on equalized assessment
Poor school boards
Wealthy school boards

Figure 4. The School Foundation Program plus local revenue, 1969.

Question 1

How has the PC government's understanding of and commitment to equity in education evolved in the last 30 years (1970-2000)?

With this question I sought to discover the understanding and commitment to equity, whether fiscal or equal educational opportunity, of each Minister of Education and other officials, from either government documents or the interviews that I conducted in 2003 and 2004. How these might have affected the government's direction related to equal educational opportunity and fiscal equity are explored in the other questions.

Hrabi saw no noticeable change between the Socred and the PC governments in their goal to achieve fiscal equity and equal educational opportunity. These goals were of paramount importance to both, and both made efforts to improve upon them. However, Hrabi believed that the methods used to achieve these two goals changed from one government to the next and continued to change over the 30 years of PC rule. It is interesting that Hrabi contended that these two goals were not something borne out of the policy directions of either the Socred or the PC government, but that their roots had developed well before 1935 when the Socred party first came to power, let alone the PCs in 1971.

Hyndman reported that the PC government believed in a strong public education system and that education should be fully funded by the public purse. He used government funding as a tool to influence the provincial education system and improve equity for students.

Education was a priority and a key function of government, Hyndman maintained, and this priority included improving equal educational opportunity, especially for elementary and special-needs students. In demonstration of this, the government sought (a) to achieve a top-quality education system that would be amongst the best in Canada; (b) to standardize the education program while ensuring that it would be responsive and flexible to those it served, both students and their parents; and (c) to improve the education of students by improving the education of teachers. Further, Hyndman believed that conducting high-quality research by using many different knowledgeable sources was most important in setting the direction and informing the decisions of the Department, including on issues touching on equity. Duke agreed and credited Hyndman with setting in motion a period of rationalization for the Department that lasted into the late 1980s before the era of politicization; in his opinion, it began and continued past 2000. An example of the rational approach, Duke contended, was demonstrated when the

SFPF and other grants increased in the 1970s by applying an escalation factor, the EPI, related to the actual cost of a basket of educational goods and services.

Hawkesworth, Deputy Minister from 1971 to 1982, recognized Hyndman for providing the basis from which improved equity for students and fiscal equity for school jurisdictions could be further developed. Hyndman's belief in the concept of fairness for students and taxpayers set the tone for the Department to achieve improved equal educational opportunity for students and fiscal equity for school jurisdictions. Hyndman focused the entire Department's activity on students; most important, Hawkesworth affirmed that Hyndman believed that the formative years from kindergarten to Grade 6 are of primary importance and needed greater attention. In 1971 the funding and resources were not equitable, Hawkesworth recalled, and Hyndman decided to do something about that inequity.

Within a year of the Lougheed PCs' taking power, the MACOSF (1972) delivered a report with recommendations to Hyndman. A core recommendation was that equal educational opportunity and fiscal equity be defined (p. 9). The committee proposed that the provincial plan provide opportunities for students to gain an education that met their individual needs, regardless of ability, talent, physical condition, cultural background, or other variables. To support such a program, school jurisdictions had to have the funding available to meet these student needs. The government was to provide revenue to poorer school jurisdictions so that their revenues would be comparable to those of wealthier jurisdictions.

Hyndman stated in the Legislature that the "broad aim [of Alberta's education system] is a quality education and a fair shake for every student in the province irrespective of where he or she lives." In 1975, prior to the provincial election in March, Hyndman reemphasized this goal when he stated that the government was

> looking to . . . greater equity from the point of view of urban and rural jurisdictions to ensure there is the maximum kind of educational opportunity for students, irrespective of where they live or the conditions under which they are taking schooling.

In both statements Hyndman addressed only the inequities that students might encounter based on where they live, not other factors such as social or economic considerations.

Given the factors that govern a civil society, Hyndman said, the public will continue to support and expect the government to devise ways and to be clever enough to deliver the tools to students that would improve the opportunity for learning for all students, including those with special educational needs.

Figure 5 depicts the 1974 funding model, which had changed from the 1969 model with the addition of special programming grants. By this time the SFPF was being delivered based on a per-pupil formula, a change from the CRU funding introduced during the time of Clark's tenure as minister. Because the plebiscite requirement was removed in 1973, the supplementary requisition increased more rapidly, which was a trend that caused problems later during the PC's tenure in government.

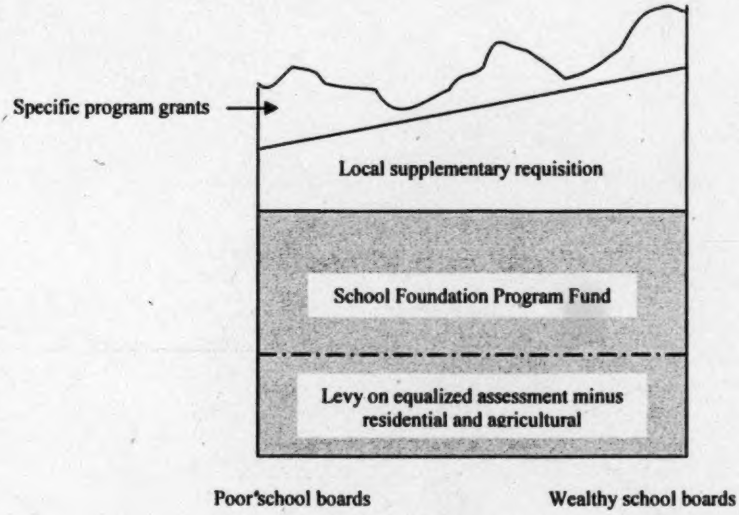
Specific program grants
Local supplementary requisition
School Foundation Program Fund
Levy on equalized assessment minus residential and agricultural
Poor school boards
Wealthy school boards

Figure 5. School Foundation Program plus local revenue, 1974.

Koziak took over from Hyndman as Minister of Education in 1975. The MACOSF (1975) delivered a new report that Hrabi recalled was important and influential. Equal educational opportunity was seen as equality of access for students to programs and services rather than equality of student outcomes or results. The committee's recommendations implied that educational programs and services should be fiscally neutral (e.g., not affected by local financial factors). Fiscal equity was considered the "first approximation of educational access" (p. 5), a statement that Hrabi and Duke echoed. The committee saw two components of funding that needed to be dealt with to address the inequity between school jurisdictions: offering an adequate "foundation level" and providing differentiated financial support to mitigate local factors that cause inequity. Table 3 compares the 1972 and 1975 recommendations on equal educational opportunity and fiscal equity.

Table 3

Summaries of the 1972 Recommendations and the 1975 Recommendations of the Minister's Advisory Committee on School Finance

1972 recommendations	1975 recommendations
Equal educational opportunity:	Equal educational opportunity:
Access for all children as a right to an education that meets their individual needs regardless of their ability, talent, physical condition, cultural background, and other variables.	Primarily, equality of access for students to programs and services rather than an equality of student outcomes or results.
Fiscal equity:	Fiscal equity:
School jurisdictions should have access to funds sufficient to provide the above adequate programs. Poorer school jurisdictions would receive funding from the government so that revenues were comparable to wealthier jurisdictions.	Educational programs and services available are fiscally neutral (e.g., not affected by local financial factors). Fiscal equity is considered to be the "first approximation of educational access" (MACOSF (1975, p. 5). Finer approximations should take into account local factors that lead to inequity. Two components of funding that should address local factors causing inequity: one was an adequate "foundation level" and the second was a differentiated financial support to address local factors causing inequity.

Education for the handicapped was still the responsibility of segregated institutions outside local-tax-supported schools and regular classrooms. This situation did not change with Hyndman. Such institutions were still making presentations to the Department to justify their educational programs for handicapped students. However, opportunity rooms, ECS, EOF, LDF, and other programs for severely handicapped students that Hyndman established continued to be refined and improved.

Koziak assumed his role as MLA and Minister of Education with the belief that he should do his best for his client, his constituents, parents, and students and that he needed to listen to them for their opinions and advice.

The 1970s were "the golden era of Alberta," Koziak recalled. "We found ourselves in government facing situations that when a government does have the money, . . . you do reach out to . . . the poorest amongst us and then respond to their needs." Indeed, he worked to determine whether requests from various groups were legitimate and worthy of funding.

Throughout the time Koziak served as Minister, in *Hansard* (Legislative Assembly of Alberta, 1975, 1976, 1977, 1978, 1979) Koziak expressed his four underlying beliefs about equity: (a) that local trustees could make the best decisions and government should not lessen the decision making of school boards, (b) that education is an investment in the future, (c) that all children should receive an education and identified special needs should be addressed by the education system, and (d) that where school boards were incurring extra costs for legitimate services such as building small schools, schools outside the major centres, and northern schools and for declining enrolments, the government should compensate them through what Koziak called *compensatory grants* (or specific program grants).

Because of a 1977 Supreme Court of Alberta decision, the government gave corporations the option of declaring their tax assessments for either the public or the separate school jurisdiction in their area. Although this improved the revenue for those jurisdictions with corporate assessment, it did not help to direct revenue when the corporation did not declare, because by default the assessment would go to the public jurisdiction. School jurisdictions with little or no corporate assessment still found themselves in an inequitable revenue position compared to that of wealthier jurisdictions.

Figure 6 illustrates the 1978 funding model. Local supplementary requisitions had started to rise as school boards exercised their freedom to increase taxes without having to go to a plebiscite, while Supplementary Requisition Equalization Grants helped to mitigate against the imbalance being created by the Local Supplementary Requisition. Specific program grants had increased in number and were becoming more complex.

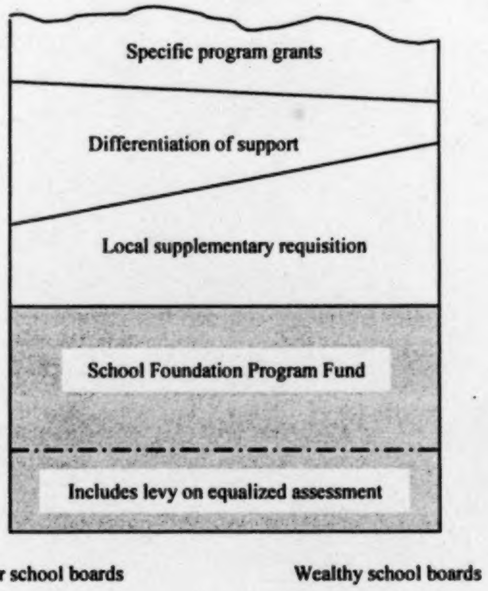
Specific program grants
Differentiation of support
Local supplementary requisition
School Foundation Program Fund
Includes levy on equalized assessment
Poor school boards
Wealthy school boards

Figure 6. School Foundation Program plus other revenue, 1978.

David King was appointed Minister of Education in 1979. During his tenure the word *equity* was used interchangeably with *equal educational opportunity* and *fiscal equity*, three closely related concepts, as Hrabi and Duke indicated. During the 1982 Legislative session, King stated, the government "provided provincial support unequally to ensure equal access to education for all children, irrespective of community and circumstances"—his definition of equal educational opportunity, or equity as he commonly called it. Later in the same session King defined equity as the opportunity for every child in the province to receive an education, regardless of where they lived and whether they lived in a small or a large community (Legislative Assembly of Alberta, 1982, p. 445). Location and circumstances were seen as issues that needed to be mitigated through special grants.

Bosetti came into his position as Deputy Minister in 1982 under King's ministry. Ten years before his appointment he had written a report for the Alberta Colleges Commission that demonstrated a strongly held belief in man's ability to choose, and it was reflected in his interview with me: "If man is perceived as being free and capable of perfectibility, it follows that he requires a strong element of choice as to how and what direction he may choose to perfect himself" (Bosetti, 1972, p. 20). It may be implied that this belief affected Bosetti's attitudes toward equity, a concept not necessarily complementary to choice, as Levin (2002) proposed.

More that 20 nonoperating school jurisdictions with neither schools nor students, according to Bosetti, received revenue from the property tax base, both residential and corporate. "This contributed to inequity. The equity issue was always a problem, and it was a huge problem at the beginning of my time with the Department." How did it contribute to inequity? Bosetti implied that because many of the nonoperating school boards had higher than average revenue per student, these students were advantaged. Although this could be considered no different from those boards that operated schools and had a high revenue per student, politicians used this situation of the nonoperating boards as an example of inequity.

With regard to the changes in the definition of equity over time, Bosetti stated emphatically, "I changed the definition. . . . A better definition for equity is the best possible education for every child in Alberta regardless of where he lives or the assessment of his community." He added that equity for the student (equal educational opportunity) was intended "to achieve the best that we could to the student's needs. So that's what we tried to move into." The concept was little different than that promoted by the government of the day. On the other hand, King defined equity during his interview as

> a question of ensuring that the 13-year-old child in Lamont or the 13-year-old child in Sexsmith would really have the resources in place in that school so that that child could get as much education as could possibly be offered,

which suggested that the resources that should be applied to the educational needs of a student be limited only to the resources available.

King did not recall the use of the term fiscal equity during the time of his ministry, and, he added, neither was equality discussed. Rather, the discussion was "couched in terms of funding unequally but appropriately in order to provide comparable opportunity for boards to work with students no matter where the student was and no matter what was the condition of the student." It seems that that condition meant that the student's own circumstances, such as ability and home life, would be included in King's concept of equal opportunity to meet the objective of providing unequal funding to achieve comparable opportunities for students.

King told the 1984 Legislative Assembly that he wanted a public education system that was "open, accessible, and welcoming not only of students but of their parents" (Legislative Assembly of Alberta, 1984, p. 471). Education is a key element of society, and local school jurisdictions should be responsible for how the program is delivered once the student has access to the school. The government believed that it "should continue to fund unequally in order to support the concept of equity" (p. 704). King continued to support school jurisdictions' offering programs to achieve equity for students by compensating the school boards for the cost of such programs, which results in unequal funding but is the nature of funding equitably, to his mind.

During the debate on the Department's estimates for 1981-1982, King asked the Legislative Assembly what was meant by a basic education. He believed that if a clear understanding of what a basic education entails would assist the government in better defining what was adequate in terms of funding and other resources, that would give students both opportunity and access to a basic education. Further, it would allow a determination of whether students were being treated equitably. These were two of three questions that the 1981 Minister's Task Force on School Finance was expected to answer (Legislative Assembly of Alberta, 1981). During our interview in the spring of 2003, King asked the question of what constitutes a basic education. If this question was not answered, then it would not be possible to address the question on the adequacy of funding for education. Further, the question of whether students were being treated equitably across Alberta by the education system could not be answered. He had hoped to be able to define a basic education during his ministry but believed that he had not; neither had it been defined at the time of the interview. He had hoped for a definition so that he could tell school boards, "This is what we the province want. This is what we are paying for, and we give you the money and you do the very best you can with this to accomplish this program."

Bosetti also held a strong belief in the need for school jurisdictions to be accountable to the Department and to their constituencies. This was reflected in the MFP, which he was instrumental in establishing in 1982 with King's expressed gratitude during King's tenure as minister. He contended that the expectation that school boards develop policy would cause a more uniform way of dealing with students from one school jurisdiction to another. The MFP was a vehicle to accomplish the goals of equal educational opportunity in all things from bussing to class size for primary grades.

King echoed a similar sentiment to Bosetti's. In his interview he said that he "saw the MFP as being halfway or two thirds of the way there" to achieving equity for students. King believed that it is necessary to set out expectations for school boards so that they know what they need to accomplish. If these expectations from the government were applied on a consistent basis across Alberta and each school jurisdiction was allowed to establish its own policy, then the provincial education system could move toward improved equal educational opportunities for students across Alberta. Unfortunately, in King's opinion, these things never happened under the MFP. In any event, in both his interview and *Hansard* (Legislative Assembly of Alberta, 1982), King was clear in his belief that local school boards should have the autonomy to operate and make decisions; that is why they were responsible for setting their own policies. Decisions included how much school boards chose to levy in property taxes.

Under questioning in 1983 from the opposition in the Legislature, King stated that he believed that the autonomy of school boards was more important than increasing the government's portion of education funding to a fixed percentage of 85%, as had been the case in Hyndman's ministry. In King's view, if the government was going to pay the overwhelming proportion of the education budget and if it was suggested that proportion would be fixed, then the government would intrude on historic understandings of local autonomy for school boards. That was not a position that the government would adopt (Legislative Assembly of Alberta, 1983, p. 1377).

In the early 1980s, King recalled, he had put into place Project North to involve the various communities across the large geographic region in establishing a representative governance system for the school division. He believed that broad community involvement would contribute to equitable and fair treatment of all of the students in Northlands School Jurisdiction.

King reported that when the Lougheed PC government took power in 1971, it believed that it could build on the Socred government's SFPF and improve the degree of fiscal equity that it provided. Besides fiscal equity, special education was in the first cluster of issues that demonstrated to the new government that equitable opportunity is not just a matter of the geographic or taxation circumstances of a board. Rather, it is necessary to look beyond the bureaucratic system into the lives of students and their parents and carefully listen to them and consider possible solutions to bring about equity.

Betkowski believed that students were central in the enterprise of education. This was reflected primarily in her statements in the Legislature during the debate on a new School Act in 1987 and 1988. Children would be "guaranteed access to the education system and to a program that addresses their unique needs," and the new School Act would guarantee a right of access to more students for the first time in the history of the province (Legislative Assembly of Alberta, 1988, p. 2110). She asked, "What are our students' needs?" rather than "What programs are available?" This was a reflection of the real change in focus from the previous School Act (p. 615). She emphasized, "All students must have access to equitable educational opportunities regardless of where they live" (p. 604).

At the time that Bill 19, an amendment to the School Act, was introduced in 1987 and was to become the new School Act of 1988, equity was described in the Department's annual report (the term *equal educational opportunity* was not commonly used at that time) under the proposed act as follows: "Every student in Alberta, regardless of where he or she lives, is guaranteed a right of access to a basic education" (Alberta Education, 1987, p. 1). To fund that equitable education, the report said, "Some jurisdictions require more help to provide a basic education than do others. The need for equity is recognized in the current method of funding, but there may be a more equitable way to provide funding" (p. 1). In a discussion paper, "Equity in Education," that was circulated throughout the Alberta educational community, equity was defined as follows:

> Every student in Alberta regardless of where he or she lives is guaranteed a right of access to a basic education. Given that equity is a primary principle of the new legislation [that was being proposed], some jurisdictions require more help to provide a basic education than do others. (p. 1)

Access to education and comparable standards for all students were proposed for further discussion in the paper, and "students throughout the province must be treated equitably (that is fairly, reasonably, and without bias or discrimination)" (Alberta Education, 1987, p. 7). Betkowski echoed this statement in her interview. She said that equity should be considered in every aspect of delivering education to students, whether it was in the collection of revenue for public education, the legislative structure, the funding mechanisms, or the actual delivery of the education to the individual student.

Table 4 compares summaries of the definitions that the MACOSF presented in 1975 to those of the 1987 discussion paper "Equity in Education." In 1975 equal educational opportunity focused on equality of access to programs and services and in 1987, on giving students a guaranteed right to a basic education and treating them without discrimination. With fiscal equity there is more in common. Both statements reflect Hrabi's interview statement that "fiscal opportunity is the first approximation of equal opportunity" (MACOSF, 1975, p. 5), and both statements reflect the concept of *fiscal neutrality*.

Bosetti, Deputy Minister in Betkowski's ministry, recalled that corporate pooling had been discussed as a strategy to decrease the size of the inequity among school jurisdictions. He was adamant that it was the only possible alternative; Betkowski shared his opinion. However, the government caucus did not accept the argument. Undeterred,

Table 4

Summaries of the MACOSF's 1975 Recommendations and the 1987 Discussion Paper, "Equity in Education"

1975 recommendations	1987 definitions
Equal educational opportunity:	Equal educational opportunity:
Primarily equality of access of students to programs and services rather than an equality of student outcomes or results.	Regardless of where a student lives they are guaranteed the right of access to a basic education. Equity needs to improve by treating students without any discrimination.
Fiscal equity:	Fiscal equity:
Educational programs and services available are fiscally neutral (e.g., not affected by local financial factors). Fiscal equity is considered to be the "first approximation of educational access." Finer approximations should take into account local factors that lead to inequity. Two components of funding that should address local factors causing inequity: one was an adequate "foundation level" and the second was a differentiated financial support to address local factors causing inequity.	Some school jurisdictions require more financial help than others. Fiscal opportunity is "the first approximation of equal opportunity" (MACOSF, 1975, p. 5). Tax effort in support of education must be as equitable as possible, for both residential and non-residential taxpayers, regardless of where in Alberta they choose to live or engage in business. While some variations in taxes across the province are acceptable to meet local needs, people living in less wealthy areas of the province should not be forced to pay inordinately high taxes for basic education programs (Alberta Education, 1987b, p. 7).

Bosetti continued the discussion with the next minister, Dinning, because he believed that it was necessary to move to corporate pooling, and in 1994 corporate pooling became a reality. Betkowski, in her interview, shared Bosetti and Dinning's belief that corporate pooling was necessary. She had pressed for this in government caucus back in 1987 and 1988 to no avail because the majority of caucus did not support the concept; that belief changed between 1987 and 1994.

According to the discussion paper, Hrabi and Duke, Assistant Deputy Ministers during Betkowski's tenure, said that fiscal equity was the first approximation of equal opportunity (MACOSF, 1975, p. 5), as seen in Table 4. Every school jurisdiction needed to have access to sufficient resources to provide quality educational programs that met the needs of resident students. This would require a variation in the amount of fiscal support from the government because local resources and costs were seen to vary across the province. Hence, a definition of fiscal equity similar to that in Table 3 emerged:

> Tax effort in support of education must be as equitable as possible, for both residential and non-residential taxpayers, regardless of where in Alberta they choose to live or engage in business. While some variations in taxes across the province are acceptable to meet local needs, people living in less wealthy areas of the province should not be forced to pay inordinately high taxes for basic education programs. (Alberta Education, 1987b, p. 7)

In 1988 the Department moved on residential and nonresidential property that had not designated taxes to either the public or separate school systems. This new system resulted in undeclared assessment being equally distributed by student between the two school jurisdictions in any given district.

The funding model became skewed toward the wealthier school jurisdictions, which by 1987 had gained a considerable advantage over the poorer jurisdictions. The provincial differentiated funding had not kept up with the increased disparity between the poor and the wealthy jurisdictions. When Figure 7 is compared to Figure 6, it can be seen that there were no new funds; however, the differences had widened because of the increased disparity in effort as reflected in the local supplementary requisition.

In her interview, Betkowski stated that not all children have the same ability to learn the same material; she believed that every child has the right to grow and be nurtured in that growth by society. Equality is sameness, according to Betkowski, whereas equity is respect for the differences and an attempt to compensate for those differences with the goal of being more equitable. Bosetti said in his interview that the Department wanted equity in the province's school jurisdictions and that for him this meant that there was sufficient funding to deal with the foundational requirement for resources and for "enough left over so you could deal with the anomalies" too.

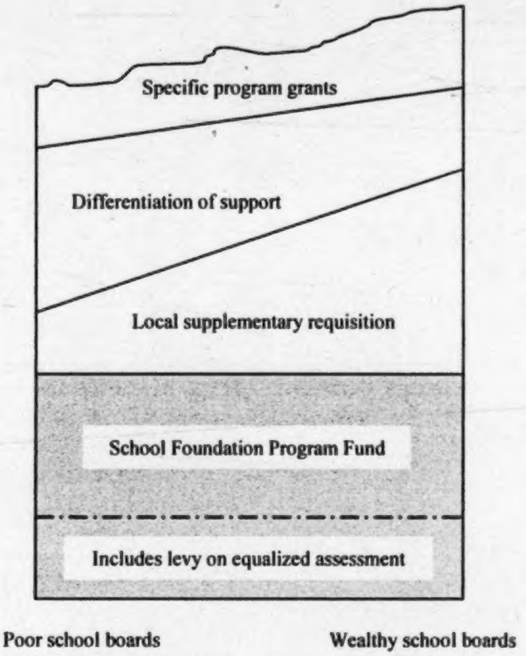
Specific program grants
Differentiation of support
Local supplementary requisition
School Foundation Program Fund
Includes levy on equalized assessment
Poor school boards
Wealthy school boards

Figure 7. School Foundation Program plus other revenue, 1987.

Wiebe, a member of the Department during Betkowski's tenure, explained that "equity for the students and the taxpayer has the expectation that everyone in a system will be treated fairly and justly without favouritism." Bemount, a contemporary of Wiebe, expanded on that and said that equity for the student involves gaining "equal opportunity results from the unequal distribution of equal assets to create equal opportunity, because different people don't have the same opportunities and you have to fill in those differences."

Duke was saddened by the decrease in the use of research to determine government policy. In the late 1980s more of a focus began to be placed on the political agenda of education; Duke termed this the beginning of a period of politicization that was still in effect up to and beyond Mar's tenure as Minister of Education.

Dinning said in his interview, "There'll never be enough money"' because of that, the government and school boards need to be held accountable and to become efficient in the use of resources. Bosetti expressed a similar opinion. Some school boards, Dinning believed, had forgotten their primary focus—the student in the classroom, not the expansion of central office facilities and staff. He contended that it was necessary to put measurements into place to determine the success of the Department's and the school jurisdictions' objectives for education.

Shortly after Dinning became minister, he began to meet with school trustees and superintendents from across Alberta in an attempt to resolve what he believed was a very serious problem facing the education system in Alberta; namely, the severe inequities in the available resources provided to school jurisdictions. He began to address this concern in every possible venue: in the Legislature, in forums with school boards, in meetings with school trustees and superintendents, and in public.

Dinning avowed that "every child should have access to schooling that a school board or the government can finance in a manner that's the most equitable no matter where they lived." Students did not start school with the same resources; therefore, the government had to put measures into place to equalize the educational opportunity for students who started with less, whether because of where they lived or their abilities, just as each school board did not have access to equal resources to provide equity for each student.

Dinning was the first minister to write an introduction to the annual report, and in his first report he affirmed that the government believed in the importance of education and must ensure that every child has an equitable opportunity to benefit from a quality education.

In March 1990 the Department stated in a discussion paper, "Equity in Education for all Alberta Students," "Equity recognizes that different individuals or groups may need to be treated differently to ensure equality of opportunity for everyone" (Alberta Education, 1990c, p. 1). Furthermore, it said that Alberta Education's policy was to provide for equity of access to a variety of educational programs and services for all Alberta students (p. 5). This is reflected in Table 5. In his interview, Bosetti verified that he and the government desired equitability, as described in the report, because it would allow them to deal with the anomalies of funding school jurisdictions and ensure that special-needs students received equitable treatment at school.

Table 5

Summaries of the 1987 Discussion Paper, "Equity in Education," and the 1990 Discussion Paper, "Equity in Education for all Alberta Students"

1987 definition	1990 definition
Equal educational opportunity:	Equal educational opportunity:
Regardless of where a student lives they are guaranteed the right of access to a basic education. Equity needs to improve by treating students without any discrimination.	[All students should be provided] equity of access to a variety of educational programs and services to all Alberta students, consistent with their learning needs - regardless of the student's social, cultural or economic backgrounds, their physical, or intellectual capabilities, or because of their geographic location and the wealth of their community (Alberta Education, 1990c, p. 5).

Dinning hoped and believed that technology such as computers and video conferencing would help to address some of the inequities that students faced in schools far from populated centres. For example, he knew that schools with small student populations could not hire a specialized teacher to meet specialized needs. When Dinning left the Department to become the Provincial Treasurer, his beliefs and knowledge coincided with the decisions that the next Minister, Halvar Jonson, made.

In his interview, Jonson expressed his belief that in the early 1990s Albertans would not stand for the inequities created by the lack of corporate pooling for much longer. School jurisdictions with a significant assessment base (that is, residential and corporate fiscal capacity and access to tax on machinery and equipment) were financially well off, whereas those without this capacity were poor. The problem was amplified by the fact that approximately 200 school jurisdictions and 40 nonoperating school jurisdictions caused further inequity. The difference in the ability of the rich and the poor to collect revenue was as much as $18,000 per student in the early 1990s. Fiscal inequity problems, Jonson observed, had the large urban school boards in Calgary and Edmonton concerned about inequity, and the inequities had to be corrected. Bemount echoed this feeling: "So that was a real problem. It created an interesting scenario politically that troubled the politicians." Jonson warned that it needed attention and that there was a need to resolve the annual deficit and reduce the debt load that the government was facing. Premier Klein accepted this position, as did others in the government caucus.

Table 5 shows a change in the definition of equal educational opportunity from 1987 to 1990. Students were guaranteed the right of access to a basic education in 1987, whereas in 1990 the definition included access to a variety of educational programs consistent with their learning needs. 1987's term *without discrimination* was defined in 1990 as programs provided "regardless of the student's social, cultural or economic backgrounds, their physical, or intellectual capabilities, or because of their geographic location and the wealth of their community" (Alberta Education, 1990c, p. 5).

In the Department's 1991-1992 annual report, Jonson addressed the challenge caused by the decreasing fiscal resources of the government. He believed that it would be "difficult to go on supporting every initiative in education, no matter how worthwhile" and cautioned that "we are in an era of setting firm priorities and making difficult choices" (Alberta Education, 1992, p. 5). In the same report Bosetti added his warning and discussed its effects on students. The provincial priorities in education included three concerns that touched on equity:

> Planning for the future in the context of increasing government budget restraints, . . . assisting special needs students by developing a draft policy on their integration in the regular classroom and improving coordination of services for them, [and] . . . developing and delivering new distance learning courses. (Alberta Education, 1992, p. 5)

In the 1992-1993 annual report Jonson continued to voice the same concern: "Given the difficult economic times in our province . . . we must continually make the difficult decisions about programs and services essential to ensuring a quality basic education for students and how best to improve those programs" (Alberta Education, 1993, p. 4). Bosetti added that efficiencies needed to be increased to ensure that "all

Alberta students have an opportunity for a quality education" (p. 6). It appears that this was a harbinger of the impending cuts to the education budget of 1994-1995.

The funding plan had to be fair and equitable for school jurisdictions and provide students with access to a quality education, according to a letter that Jonson wrote to Wayne Jacques, who chaired an MLA committee that Jonson had commissioned to study and make recommendations on equitable funding for school jurisdictions (Alberta Education, 1994b) . In the Legislature Jonson warned that it was essential that the government's overall funding plan for education provide equal opportunity for all students in Alberta: "This is what we want to ensure: there is equitable funding, that every student has equal opportunity for an education as possible, as practical, in this province" (p. 1273).

During the debate of Bill 19 in 1994, an amendment to the School Act, Jonson provided a definition of equity for school boards (fiscal equity) and for students (equal educational opportunity). He declared that the purpose of the amendments to the School Act was to

> guarantee to all school boards of equal access to all education funding for every student in the province no matter where he or she lives and irrespective of whether that child is registered in a public or a separate school. The provision of equal access to full funding for Catholic school jurisdictions in Bill 19 is of great significance. (Legislative Assembly of Alberta, 1994, p. 1965)

In the next sitting of the Legislature in 1995, Jonson identified five government priorities for education. Two of them touched on equity: "All Alberta students must have equal access to quality education and [Alberta is] to have a fair system of funding for all school boards in this province" (Legislative Assembly of Alberta, 1995, p. 613). Jonson added that the resources were "to be focused on students and classrooms and education costs [were] to be reduced to meet the government's spending target as part of the province's overall deficit elimination plan" (p. 613). It was a tall order to achieve a fair system and a reduced spending target at the same time.

In his interview Bosetti stressed that equity needed to be addressed in the late 1980s and into the 1990s, however difficult it was to tackle. By 2000, despite the difficulties, he was convinced that equity had improved on the revenue (fiscal equity) side of the funding equation as well as in the delivery of services to students (equal educational opportunity). *Equality* was not a term that applied to what the government was trying to do in the 1990s, according to Bosetti; however, *equity* was applicable. To improve equity, it was necessary to avoid acting on a consensus basis on changes to education in the mid 1990s. Consensus, in his opinion, had been an error of the government earlier when Betkowski and Dinning had tried to gain consensus of the school boards in Alberta. Consensus, in Bosetti's estimation, leads to mediocrity.

No matter how sophisticated the government is, it is impossible for it to address all equity issues, whether fiscal equity or equal educational opportunity, Wiebe contended. Achieving the levels of equity in the 1995 funding framework was remarkable, although it contained some flaws at its introduction. In the final analysis, Wiebe said, equity changed for the better in 1995 for school boards and students than it had with the model that existed prior to 1995. Sloan, who succeeded Bosetti in 1996, confirmed the accomplishments of the new funding framework.

Figure 8 is a general description of the funding model that was used after the changes in 1994. It is a much more equalized system of funding because it meets the definition of restitution equity. As shown in the diagram, the specific program grants include the grants for high-needs students, whereas the differentiated support includes sparsity and distance and transportation. Special-needs grants were still being offered, which met some of the definition of positivism equity. This model did not see significant change to it until September 2003, which was a time outside the scope of this research.

During debate in the Committee of Supply in 1997, Mar espoused the opinion that "how we relate to our equals is not the true test of our society; [rather, it is] how we relate to those who are less that ourselves" (Legislative Assembly of Alberta, 1997, p. 138). Questions arose about the relationship of the government to students in employing the funding model available and about the adequacy of the funding provided after the budget cuts in 1995. Mar replied, "I'm of the view that the funding that we do provide from the government to school boards is an adequate level of funding" (p. 138). Given that the funding was adequate, in Mar's opinion, the problems with funding that school boards experienced were their own responsibility. Later, in debate, Mar proclaimed that "every student in the province should and must have equitable access to the same quality of education" (Legislative Assembly of Alberta, 1989, p. A15).

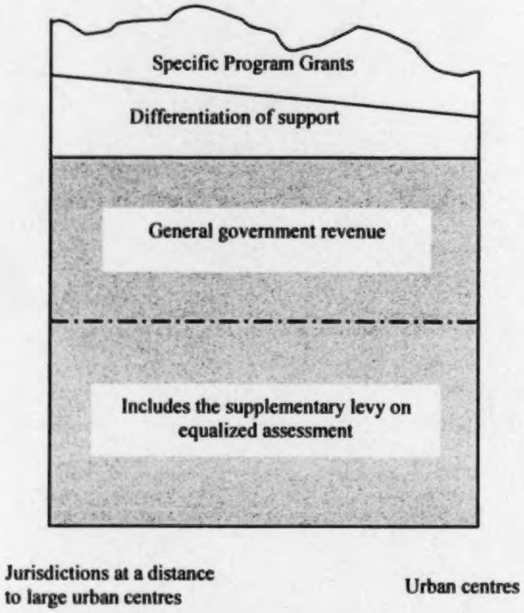
Specific Program Grants
Differentiation of support
General government revenue
Includes the supplementary levy on equalized assessment
Jurisdictions at a distance to large urban centres
Urban centres

Figure 8. New funding framework, 1995.

In the eyes of the Opposition, public education was under attack because private schools were being granted increased funding, which put private schools in a better economic position than ever before. "Supporting educational choice," Mar said, "is an essential part of being responsive to community needs" (Legislative Assembly of Alberta, 1999, p. DSS74). He did not see a downside to equity for students as a result.

In 1999, during debate on the Department's estimates, Mar emphasized that one of the government's goals was that "children have access to services they require," a similar statement to that found in Table 4; however, he added, "This government is fully committed to helping every student achieve his or her full potential" (Legislative Assembly of Alberta, 1999, p. DSS74). For the first time in Alberta a minister had spoken in the Legislature of a concept that resembled outcome equity, which was different from earlier definitions that limited outcome equity to equal educational opportunity. Mar saw this as a laudable goal for the government, combined with ensuring that students experienced equity regardless of where they lived in Alberta. Two years earlier in the Legislature Mar had presaged this new idea: "Equitable funding ensures all students have equal access to the programs and services they require" (Alberta Education, 1997a, pp. 4-5). This suggests that ensuring that all the resources would be there for a student would be considered, regardless of the cost; however, this idea had yet to be fulfilled in 2004.

Palmer, in his interview, spoke of discussions on outcome equity during his time as Deputy Minister of Education. The concept had become a strong topic of conversation in his office and in the Minister's near the time that Palmer left the Department. He lamented that his efforts to apply the concept had failed, for the most part. The application of resources would be very complex, which makes the idea cumbersome. He said, "It's not going to happen."

Bemount addressed the concept of equity of outcomes. He said that the problem is that you have to "define the outcome you're trying to accomplish before you can decide whether you've accomplished it or not." What is a satisfactory outcome? There are many variables, he said. Test scores probably are not sufficient to measure outcome, in Bemount's opinion. If it were possible to define a well-educated student, the definition would probably be different for every student and every parent. As Palmer said and Bemount agreed, it is not going to happen because of its extreme complexity.

Mar, Palmer, and Bemount presented a variety of views on the topic of outcome equity. It is worth noting that it was an idea that was discussed during Mar's time as minister. It appears that Palmer introduced the idea to Mar; however, Bemount, who was in the Department as a director, saw difficulties in implementing meaningful measures to accomplish outcome equity.

Social equity was yet another concept that Palmer had considered but not achieved. He defined social equity as "how you use a limited resource to the best possible good of society," a concept that could be viewed as close to the idea of efficiency as it relates to equity.

Mar believed that in 1999-2000 students were offered, along with equity, a much broader scope of programming in school than their parents had ever been given (Legislative Assembly of Alberta, 1999, DSS84). This was a positive evaluation of the education system. However, MLAs, special interest groups, and the general public continued to question on many occasions the adequacy of funding directed to students. Mar held the position that school boards were receiving adequate funds to deal with all students in their jurisdictions.

School systems had to focus on students, Mar said in his interview, and, according to Confucius, education is the key to a harmonious society. Further, "the process of education is to make people privately happy and publicly useful." His definition of equity for students was in recognizing that "the principles were to try and draw the differences [in students] closer so [that] . . . regardless of where in the province of Alberta a student resided, there would be more similar funding."

The objective for the changes in 1995 was to narrow the variation in the funding levels for school jurisdictions; but there still needed to be recognition, in Mar's opinion, that not every student could be funded in the same way.

In discussing the restructuring of the funding formula in 1995, Mar was reminded of Gustav Mahler, the composer: "The point is to go through one's life unerringly doing the right thing, guided not by the beacon of public opinion, but by doing what is right; being neither seduced by a cause nor disappointed by failure." The government did the right thing, not necessarily the popular thing, in 1995. Mar argued that it was done despite the opposition and dissatisfaction that came from some quarters. That is the reason that the government did the "full Monty" in 1995, Mar said: to accomplish the right thing for education in Alberta.

When I asked Mar, "Did the characteristics of equity, either fiscally or for students, change during your tenure as an MLA?" he answered unequivocally, "Yes." I then asked him if equity had changed during his tenure as Minster of Education, he said, "No," because his Department had only fine-tuned what had been changed in 1995 under Jonson. "In Minister Jonson's time," Mar recalled, "the most significant change was the new fiscal framework that included the pooling of residential and nonresidential property taxes." This was echoed in his message in the 1995-1996 annual report:

> Our education system has undergone major restructuring to focus resources on students in the classroom, to ensure more decision-making at the local level, to increase community and business involvement and to put in place a fair and equitable system of funding. (Alberta Education, 1996a, p. 5)

Mar reiterated Jonson's earlier messages about changes to education, specifically:

> Before 1995, the per-student amount that school boards had to spend was determined by the wealth of the local tax base. Large inequities existed. Beginning in September 1995, funding for all boards was based on the amount needed to provided a basic education for each student and a fair system of funding was achieved. (p. 5).

In summary, the definitions of equity, fiscal equity, and equal educational opportunity, changed, as did the beliefs of those in leadership from 1970 to 2000 but the underlying concept of fairness remained the same. At the beginning of the PCs' tenure, school jurisdictions did not necessarily have to provide an education to all resident students. By 2000 all students were to have access to an education designed to meet their needs. Funding formulas also changed throughout the 30 years in an attempt to fund more equitably; however, the change was most dramatic in 1995 when the government took over all taxing authority for education, which resulted in equalized funding.

Question 2

What were the reasons for the changes made to achieve equity in education over the timeframe described in the study?

Before the Lougheed PC party came to power in 1971, the PC opposition caucus had traveled across the province to listen to people and develop an election platform. Around the same time, teachers and parents of handicapped children made presentations to the Socred government and the PC opposition on the need to address the educational needs of children with handicaps. The government tended to ignore these presentations, but the opposition listened and responded. Hyndman, Clark, and Speaker recalled that the

PCs' response aided the Lougheed PCs in garnering a majority in the 1971 election and forming the government.

Hrabi and Clark commented on the influence of parents with handicapped students on the ministry. Their involvement resulted in special interest groups being organized and active in lobbying government. The media gained a new source for news on education. It was Hrabi's, Clark's, and Speaker's opinions that these new special interest groups and the media's reporting of their opinions influenced the government to consider these newly empowered groups, in addition to receiving opinions from constituents.

Starting in 1969, commissioned by Minister Bob Clark, Dr. Worth (1972) conducted a review to look at the future of education in the province and wrote a report for the minister. The report, "A Choice of Futures, a Future of Choices," included the topics of equal educational opportunity and fiscal equity. When Worth's report was delivered to Hyndman in 1972, it had little impact on the newly elected government. Rather, Hyndman recalled that the information that had been collected prior to 1971 by the PC Opposition was of more influence. The government used Worth's report only to verify the information that it had collected from Albertans. Fennell (1985, p. 78) corroborated this in his dissertation

Hyndman's beliefs influenced the direction that he set for the Department. These included the belief that the government needed to support public education, that the public purse should support public education, that there needed to be improvement in the education system for it to become amongst the leaders in Canada, and that locally elected school boards should be autonomous. His thinking was congruent with that of officials in the Department; namely, Dr. Hawkesworth, Dr. Hrabi, and Dr. Duke. Further, Hyndman valued research; it became an important influence on the government's decisions concerning education, according to Duke and Hrabi. Hyndman's strong belief in the importance of preschool and elementary education drove him and his Department to take measures to bolster and improve education in the formative years of schooling (ECS and elementary grades).

Stakeholders such as the ATA, the ASTA, and parent groups were sought for advice by including them on committees that considered all aspects of education in Alberta. Hyndman and Koziak reported that the constituents were listened to and that their input influenced all government policy, including education.

When Bob Clark and Grant Notley, both members of the Opposition at the time that Hyndman was minister, questioned him on education, he responded by making changes in the Department. Other opposition MLAs addressed the government during question period, debated on legislation, and considered Department estimates in the Legislature. The data suggest that the opposition was heeded on occasion, as were the statements made by MLAs who sat on the government side of the house.

The government's revenue from oil and gas royalties began to influence funding for education, particularly prior to the 1975 provincial election. Hyndman's request to Hawkesworth to establish the supplementary equalization fund was one such initiative. The Alberta economy was expanding in the 1970s. Pressures to increase education facilities came from urban areas where populations were growing. Skilled labour was increasingly hard to find, including teaching staff; and inflation was rising. These factors influenced the government and its funding of education positively. When he was minister, Koziak recalled, "It was the golden era of Alberta." Funding was available for new education programs and projects without having to eliminate the existing programs. There was a desire by the government, Koziak said, to help people through government programs, and education was one area where he believed it did help.

As in Hyndman's tenure, during Koziak's ministry the government made an effort to listen to all Albertans, according to Koziak, whether they supported or opposed the government's positions. Koziak recalled that the Department continued the tradition of involving and consulting all of the educational organizations, as Hyndman had done. Research continued to examine the broad scope established by Hyndman; it continued to increasingly influence the Department's decisions until the late 1980s, according to Duke. The MACOSF delivered its report in 1975, which helped to set the stage for the Department's future direction and equitable treatment of students as well as school board funding.

New issues began to emerge in public education related to equal educational opportunity that influenced fiscal equity policy. They included declining enrolments for school divisions, small-school costs, and the fiscal inequities that some school jurisdictions experienced because of low revenue from property assessments. Koziak and his Department addressed them with differentiated funding.

In the late 1970s the Minister of Municipal Affairs, according to O'Brien, lost interest in monitoring the SFPF and local school board supplementary requisitions. School boards increased their supplementary requisitions. Its impact on the ability of municipalities to increase their property taxes, O'Brien recalled, caused municipalities to seek resolution from the province to the tax pressure being felt by the school boards' increased levies. Increased teacher salaries and operating costs caused school boards to pressure the government in 1983 as provincial revenues began to decrease. The MFP, introduced in 1984, was designed "to gain control over expenditures and to temper school board operations" (Ell, 2002, p. 61). Ell concluded that this was, in part, a response to education costs beginning to shift and having an impact on the municipalities when the school boards raised tax revenues to maintain per-pupil expenditures at previous levels. As a result of the threat of lost taxation room, municipalities put pressure on the government to address their decreased tax capacity in the hope of regaining some taxation room.

In a discussion paper made available to the educational community in 1987, Alberta Education (1987b) sought feedback on financing education. It declared that students should have access to "a high standard of education that was comparable to that offered in other parts of the province" (p. 6). This significant issue at the time caused the debate on the need for corporate pooling to equalize the funding available for all school jurisdictions beyond that offered by the SFPF. Betkowski pressed the government caucus to adopt corporate pooling. Jonson, newly elected, joined in the argument to support the implementation of corporate pooling. However, prior to the 1988 School Act's being declared law, corporate pooling was rejected by the government caucus; it did not reach the Legislature for discussion at that time.

Through the 1980s the municipalities increased the pressure on the government to resolve the problem. One avenue considered was to pool the corporate assessment across the province; however, the government caucus rejected this idea until 1994.

At the close of Koziak's tenure as minister, Mrs. Carriere, a parent in Lamont, launched a successful legal challenge through the courts against her child's school board. The court decision in June 1979 resulted in David King, the next Minister of Education, being forced to respond to the school board's need for new resources to support the educational program for Mrs. Carriere's child in her home school. According to Speaker, Clark, and King, this court decision had major implications for the equity that students, regardless of their handicaps, would experience from that point forward in Alberta. The court decision, according to Ell (2002), paved the way for special-needs students to be mainstreamed later into the regular local-school classroom. With an increased need to address special-education programs in schools, the Department took on the responsibility of developing curricular support. Curriculum guides were completed in 1981 and 1982 for the educable mentally handicapped, the dependent handicapped, the trainable mentally retarded, and the visually impaired. Although these guides did not directly result in funding, they did signal the importance that the Department attached to special-needs education and improving equal educational opportunity.

The MACOSF delivered reports in 1971, 1975, and 1981. This committee, comprised of individuals from the educational community, including the University of Alberta, made significant observations on the state of equal educational opportunity and fiscal equity. In 1981 the committee produced a revised definition of equity, a moderate change from the 1975 report. The report provoked Minister King to ask the committee to answer additional questions; it was apparent that it held influence on such items as the EPI and the inequity caused by distance from a major trading centre for school jurisdictions. However, King did not act on some of the recommendations, including those related to the need to return to the 1975 formula in which 85% of education funding came from provincial revenue.

In the school boards' estimations, the funding formula had become complicated because it addressed the identified needs of school jurisdictions on issues such as small schools and a variety of concerns related to identified special student needs. In 1981 a task force recommended to the minister a simplification of the school grants regulation. In turn, this influenced the Department to simplify the formula prior to the end of King's term. A number of equity grants were rolled into one equity grant.

The minister's key officials, Dr. Hawkesworth, Dr. Hrabi, Dr. Duke, and Dr. Odenak, remained in the Department during the time of Hyndman, Koziak, and into King's tenure as minister. In 1982 Dr. Hawkesworth retired, and Dr. Bosetti was appointed Deputy Minister. According to his statements, it was evident that Bosetti brought a different approach to the ministry from that of Hawkesworth. One example was Bosetti's attempt to seek increased accountability and decreased complexity to funding, as was reflected in his different approach to formulating the MFP.

The signing of the Canadian Constitution in 1982 and the Charter of Rights and Freedoms influenced the government to include equity provisions for students. One such equity provision for francophone students began to be addressed in 1983 by amending legislation introduced by King. This was reinforced in 1990 by a Supreme Court ruling in the Mahe case. Dinning, newly appointed Minister of Education, interpreted the decision directly that when a sufficient student population demanded a francophone education, the province would supply services to those students based on a sliding scale. When the numbers warranted, a new francophone school jurisdiction could be formed. Dinning established a number of such francophone school jurisdictions.

School boards, their trustees, and the ASTA continued to make effective representation to the Department on the importance of their maintaining their autonomy to make decisions and impose a supplementary requisition on property. This influence continued into the tenure of Betkowski; however, during Dinning's ministry, the school boards' usefulness came into question when he was unable to arrive at a consensus with the school boards on corporate pooling and other solutions to resolve fiscal inequities among school jurisdictions. During Dinning's term, the school boards' influence declined because of their failure to reach consensus on issues.

Betkowski brought a perspective on education that she had gained when she acted as Hyndman's executive assistant during his time as minister. When she was appointed

Minister of Education, she was the mother of a newborn baby and believed that, being a mother, she could relate to parents more easily. Such was the case when she attended a meeting in Calgary with a group of mothers of handicapped children. Betkowski was particularly struck with the need to allow handicapped children access to schools.

Besides believing that her first job was to represent the people of her constituency of Glenora, Betkowski saw her second job as representing Albertans. School boards were also influential in convincing her that fiscal equity needed to be preserved and applied in the less-wealthy school jurisdictions to provide acceptable service to their students.

In 1987 the United Nations (UN) Resolution on the Rights of the Child was passed; the Alberta government caucus debated it with Betkowski, who led the debate for acceptance. The government caucus rejected her arguments and the UN resolution.

The new School Act, pronounced law in 1988, guaranteed all children access to an education, a fundamental principle of equity, but the funding of such access remained in question. Beginning in 1983, reduced provincial revenue and rising debt caused the government to cut budgets further than it had done earlier, which had an impact on the Department. Betkowski accepted cuts to her department's budget in the funding for school boards, with the exception of special needs. Financial reductions continued to plague the government through the 1980s.

Dinning was influenced heavily by the severe fiscal inequities that he had observed in the province amongst school jurisdictions. He particularly noted that poor school jurisdictions had just under $4,000 to spend on each student, whereas some of the wealthier school jurisdictions had $20,000. Dinning toured the province to talk about solutions to the fiscal equity problem. Municipalities believed that they were being squeezed out by school boards who also used the property tax base for revenue. Speaker, Minister of Municipal Affairs, joined the municipalities' cause in pressing Dinning for a solution to the taxation and revenue problem.

Although Dinning requested a review of special education in 1990, the primary focus for the Department and the minister was fiscal equity. Along with debate on fiscal equity, the annual provincial shortfall of revenue caused a deficit and increased the provincial debt. Dinning declared the debt as the second priority of government after delivering health and education services. Nonetheless, school jurisdictions sought increased funding from the government and from the local property ratepayer. This led to Dinning's quoting the Governor of Maine: "By breaking the cycle of funding increases in our schools, we force a change from expensive inputs to learning-oriented outcomes. We have the opportunity to realign our educational efforts to focus on creative solutions to our needs" (Legislative Assembly of Alberta, 1992, p. 483).

Dinning identified Bosetti as a significant player in determining the Department's direction. Although it was tempered by input from the caucus and Cabinet colleagues, Dinning recalled that he relied on Bosetti's advice; Bosetti influenced Dinning's decisions and actions as minister. He intimated that that influence continued even during Dinning's tenure as Provincial Treasurer.

Jonson came to the Department as minister with opinions that he had voiced in 1987 on the need for corporate pooling. In his interview he recalled the influence of the two school jurisdictions in his constituency (Ponoka and Lacombe)—jurisdictions with two different levels of wealth for taxation. Bosetti added the political will to tax was different from one school jurisdiction to the other. Furthermore, Premier Klein's objective, announced in January 1993, to reduce government spending and address the deficit and accumulated debt had a significant effect on Jonson's direction to reduce spending and improve efficiency within the Department.

The opposition parties in the Legislature appear to have had little impact on Jonson and the government. *Hansard* records (Legislative Assembly of Alberta, 1993a, 1993b, 1994, 1995, 1996) show that the exchanges between the opposition and the government during question period and debate resulted in little or no change in the government's direction in legislation and budgetary estimates. What is most evident in *Hansard* is the government's defensiveness against the opposition's suggestions and criticisms. Earlier ministers, particularly from Hyndman to Betkowski, may have bantered in the Legislature with the Opposition; however, within their amendments to legislation and the budgetary estimates, the debate and questions from the Opposition resulted in changes being made by the government prior to the time of Dinning, Jonson, and Mar.

Bosetti recalled participating with Jonson in the 1993 Treasury Committee on Estimates, chaired by Dinning, who was seeking a 20% reduction in the Department's budget. Bosetti opined that there was a nexus of events and ideas that resulted, because Dinning, who was the Provincial Treasurer, had tried unsuccessfully as Minister of Education to resolve the fiscal equity problem among school jurisdictions. Jonson hoped to resolve this problem, which he had observed first hand from the time that he was a school principal in Ponoka to when he was first elected as MLA. Additionally, Bosetti, deputy minister for over 12 years, had worked on the fiscal equity issue with all of the Ministers of Education from King onward. The three of them, Dinning, Jonson, and Bosetti, held the same objectives, and the timing allowed them to move forward on the fiscal equity problem in a dramatic fashion. There was little opposition in caucus. The *full Monty* was a term that all three used to indicate that everything had been accomplished as planned. The consolidated tax money from local school authorities was placed in the government's Alberta Education Trust Fund for redistribution on an equal basis to school boards. Fiscal equity had been achieved, according to Bemount, Bosetti, Dinning, Duke, Hrabi, Jonson, Mar, and Wiebe, because the conditions were right for a bold move by the Department. O'Brien reported that Jonson, Dinning, and Bosetti came to "the conclusion that they . . . might as well go for the whole wad. . . . It became apparent that you might as well be shot for a sheep as a lamb." Bemount described the move as "a bright idea" because up to that time the government caucus had been deadlocked on the issue of corporate pooling without even having considered taking essentially all of the taxation power away from school boards.

In 1994 Wayne Jacques, a PC MLA, chaired a committee charged by Jonson to develop a new funding framework that was "fair and equitable to school boards and provides every student access to a quality education" (Alberta Education, 1994b). From this committee's recommendation came the concept of block or *envelope* funding. Under Mar's tenure as minister, a second committee chaired by Jacques set out to determine

> if the funding framework was allocating funding in a manner that was fair and equitable to all school jurisdictions and if the framework provided the flexibility needed to reflect student needs and deliver efficiencies while meeting the local program objectives and needs. (p. 5)

Although the report made numerous recommendations, the minister acted on only two that affected equity for students. One was the removal of the cap on the number of high-needs students who were to be funded in any jurisdiction, and the second was the increased funding for ECS from the reduced 200 hours back to the 400 hours that had been available prior to 1995.

O'Brien explained that the government took over all of the local school boards' taxing authority, and a 3% taxing provision was left to the school boards through plebiscite. Although the provision was available, the plebiscite did not effectively allow school boards any autonomy or control over their finances. School boards made a few attempts to seek extra funding by plebiscite, but in each instance, much the same as in Clark's time as minister, they all failed.

The petroleum industry, led by Syncrude, lobbied for the elimination of the Machinery and Equipment tax, which had supported education, according to O'Brien. Klein's PC government responded to the pressure in 1994 and eliminated the tax, which resulted in a net loss in government revenues of an estimated $100 million.

Sloan recalled that the Department's improvements to funding for school transportation, special needs, sparsity and distance, distance learning, and facilities were all influenced by data collected through research by members of the Department. Typically, it was spot research that depended on the need to review the efficacy or success of various funds; it was not ongoing or longitudinal. According to Wiebe, research was often used in the 1990s to fine-tune the fund formula.

Table 6 is an abbreviated summary of the influences addressed in this chapter on the Department's actions with regard to equity from 1970 to 2000. No weighting was given to one influence over another. In other words, one influence may have had a significant impact on the Department, whereas another had a small impact. The table does not differentiate, but only summarizes the reasons and influences. In summary, the reasons that the PC government addressed equal educational opportunity and fiscal equity from 1970 to 2000 varied, as did the outcomes they sought.

Table 6

Summary of Reasons for and Influences on Department Actions

Reason or influence	Hyndman	Koziak	King	Betkowski	Dinning	Jonson	Mar
Constituents	+	+	+	+			
Pre-1971 information	+						
Parents of handicapped	+	+					
Worth Report							
Hyndman's beliefs	+						
Department officials	+	+	+	+	+	+	
Broad-based research	+	+	+	+			
Spot research						+	+
MLA committees						+	+
Education stakeholders	+	+	+	+			
Opposition parties	+	+	+	+			
Government caucus	+	+	+	+	+	+	+
School boards	+	+	+	+	+		
Alberta economy	+	+	-	-		-	
Provincial revenue	+	+	-	-	-	-	
Debt/deficit				-	-	-	
Municipal Affairs	+				+		
Municipal lobby				+	+	+	
Declining enrolments and small schools		+	+	+	+		
Carriere court decision			+				
MACOSF	+	+	+				
Curriculum guides for the handicapped			+				
MFP			+	+			
Special interest lobby	+	+	+	+			
Canadian Constitution Bill of Rights			+		+		
Francophone lobby and court decision			+		+		
Desire to solve fiscal equity					+	+	+
Increasing costs			+	+	+	+	
Calgary mothers				+			
UN Rights of the Child				+			
1988 School Act				+			
Bosetti					+	+	+
Petroleum industry lobby: M and E tax						-	
CBE opposition to the government						-	

+: positive influence on government; -: negative influence.

In Summary

The needs of students drove policies on equal educational opportunity because parents and teachers presented these issues in the late 1960s. The PCs listened. Parents, in particular, formed effective lobby groups that influenced the government to address the special needs of students. The Carriere court decision, the Canadian Constitution, and the Canadian Bill of Rights all contributed to the government's response. In 1990, under the Klein government, special interest groups lost their ability to influence the government on educational policy to the degree that they had previously.

Although Hyndman, Koziak, King, and Betkowski addressed fiscal equity during their terms as Ministers of Education, student needs were paramount. This was evident from Hyndman's recognition of handicapped and special-needs students in 1972 to Betkowski's argument that students had to be at the centre of the 1988 School Act. Although revenue began to decline in the early 1980s, the focus remained on students. As the 1980s closed, fiscal equity became Dinning's focus and remained so through Mar's tenure as minister, likely because of the mounting provincial debt combined with a decline in resource royalties.

Opposition parties appear to have influenced government actions more in the 1970s and 1980s, and their influence waned in the 1990s when the interest accrued on the provincial debt rose and greater accountability carried greater influence in dealing with fiscal equity. Student equal educational opportunity was given less emphasis. Business interests may have exercised influence over government taxation strategies in the 1990s, whereas parents and teachers were considered special interest groups who did not gain the ear of Klein's government.

Research in the Department was academic, broadly based, and included the major players in education from the 1970s into the 1980s. As the 1980s closed, and throughout the 1990s, research became more a tool for spot-checking the funding framework; it became the job of MLA committees rather than of Department staff to seek public opinion through political forums while Department staff conducted spot research on the need and effectiveness of funding.

Question 3

What methods were used, and did they achieve the desired results?

1. What did the funding formula look like in 1970?

This question is answered under separate headings that speak to the methods used to achieve fiscal equity and equal educational opportunity.

School Foundation Program Fund

In 1970 Alberta's public education system was funded on the SFPF model established in 1961. Clark (1968-1971) approved revisions to the SFPF model that was designed to deliver funding to school jurisdictions based on CRUs. A ratio was applied against a base classroom amount that depended on the grade level; division 1 was funded based on a factor of 1.0, the junior high factor was 1.2, and the high school was 1.8. The formula did not allocate funding units of fewer than 13 students in any classroom. Although the model worked well for medium to large school jurisdictions that had few classes under 13, it had negative effects in small school jurisdictions with many classrooms with fewer than 13 students. The PC MLAs recognized the inequity early in their opposition role in 1967. Until the 1971 provincial election, the PCs capitalized on the inequity and called the CRU funding plan unfair, particularly for school jurisdictions with small schools and small classes. The Socred government failed to address the inequity; rather, the Socreds defended the funding arrangement.

The government levied an educational tax levy of 30 mills on all property—residential, agricultural, and corporate assessment—in the province prior to 1971. The levy was used to support funding to school boards.

Differentiation of Support

A differentiation of support was found in school grant regulations (SGRs) that included location allowances and transportation grants beginning during Hyndman's term. The government provided location allowances to school jurisdictions that faced challenges of higher than average costs of operation, primarily because of remote locations.

Specific Program Support

Funding to support specific programs such as those for handicapped students was made available prior to Hyndman's tenure; however, he expanded these programs to encourage all school jurisdictions to become involved in serving all students, including those with special needs. Special education had been funded in 1970 through institutions not necessarily under a public school jurisdiction's governance to educate students with a variety of identified handicaps, including hearing loss, blindness, and mental deficiencies. Funding was also provided to school jurisdictions that requested support for opportunity classes for children who were below the range of normal intelligence or those who required special provisions because of impaired hearing or vision.

Local School Board Taxation

Supplementary requisitions on assessed property value were a secondary source of revenue for school boards, in addition to the SFPF. The 1970 supplementary requisitions made up over 12% of the revenue, on average, that the school boards collected across the province. They were limited to a maximum 3% increase to their levy and were permitted to increase their supplementary requisitions beyond that level only by going to a local plebiscite. Although this measure, brought into effect in 1969, proved to be difficult for boards to implement, it was democratic, according to Bob Clark.

Governance

The amended 1969 School Act, other than the restrictions on increases to the supplementary requisition, provided school boards with a considerable increase to their autonomy in operating their school systems, which was seen as a significant gain. Each Minister of Education trumpeted this benefit to school boards, and it was protected from Bob Clark's through Jim Dinning's tenure.

2. **How did the formula change from 1970 to 2000 to meet the policy goals of the PC government, did the policy achieve its goals, and did it improve equity for students and taxpayers (i.e., was it effective)?**

As established in the earlier subquestion, this subquestion is divided into the same five categories. The same format will be used throughout the responses to this question.

School Foundation Program Fund

Early in the 1972 sitting of the Legislature, Hyndman brought forward a change to the CRU funding formula. The Department's estimates reflected a change from CRU to per-student funding, and the amount of the funding was based on whether the student was in elementary, junior high, or high school. Gordon Miniely, Provincial Treasurer, touted the change as one that would improve equity for students. In part, the formula change removed the penalty to small jurisdictions when they attempted to provide instruction to classes of fewer than 13 students in small schools. With the new funding formula, school boards with small classes now received a portion of the cost of providing instruction and other services to small classes, but this was still not sufficient to pay for the full cost of the small CRUs. By 1974 the Department accepted this notion and provided an additional grant for small-school assistance to offset differentiated costs. In 1977 a further grant, the Small School Jurisdiction Grant, was made available to further address differentiated costs.

The SFPF continued, and funds were distributed to school jurisdictions based on the same ratio between grade levels that the Socred government had developed until Koziak had it changed in 1976, narrowing the range.

Hyndman fulfilled a 1971 PC campaign promise to eliminate the education levy for senior citizens in 1972. Further, to fulfill the campaign promise to reduce what was seen as a regressive property tax, the government reduced the education levy for residential and agricultural taxpayers in 1973 and 1974, respectively, not to improve fiscal equity for the taxpayer, but rather to reduce property taxes that were considered regressive and are still seen that way. Taxpayers in poorer school jurisdictions potentially still carried a heavier burden than their counterparts in wealthier school jurisdictions did; however, the tax reduction lessened the burden. O'Brien recalled that this measure of reducing the education tax levy was, in part, the response to municipalities' desire for more fiscal capacity to tax. More tax room became available not only for municipalities, but also for school boards. The competition for property tax revenue continued between the two levels of local government until 1994. School boards, in general, increased their supplementary requisitions at rates that outstripped inflation and the government's increases in funding.

From 1976 to 1994 the elements that governed the SFPF remained essentially the same. However, the amount of funding provided by the SFPF increased each year, with the exception of 1984, which saw a 0% change, and 1987, with a 3% reduction. In the years prior to 1990, Duke reported, increases were determined through careful empirical research by the Department.

Differentiation of Support

Supplemental funding to the SFPF provided a differentiated level of support from the government. Funding was designed to assist poorer school jurisdictions where local factors prohibited revenue levels comparable to those of wealthier school jurisdictions. Such funding became known as *equalization* or *equity* funds. From 1970 to 1985 the equity grants evolved as follows: Location allowances evolved into a remote rural grant in 1973 and then a distance grant in 1977, a supplementary equalization grant in 1975, a declining enrolment grant, a small school assistance grant, a small school jurisdiction grant, a small centre grant, and a corporate assessment grant. In 1985 all of these grants were rolled into one grant, the equity grant, and remained in place until 1994, when the government took control of all revenue for public education.

Although equity grants helped to narrow the gap between the wealthy and the poor school jurisdictions, they did not fully eliminate fiscal inequities. To resolve this inequity, Duke created a more responsive and complex funding formula; however, the complexity reached a point at which school boards demanded that it be simplified; hence in 1985 the equity grants were combined into a single grant.

Another problem with addressing fiscal equity was the varying ability of school boards to raise similar supplementary requisitions per student. This problem is addressed below.

Specific Program Support

Special needs. Hyndman introduced specific program funding to address student needs that the PCs had acknowledged before and during the 1971 provincial election campaign. Thus, he increased the funding for special education. Opportunity rooms had been in existence prior to 1971; by making the funds more attractive, more school boards offered programs. Other special-needs initiatives were introduced in 1973, including the LDF, special funding for retarded students, funding for the learning handicapped, and a diagnostic testing program for elementary students who had special needs. Hyndman emphasized special-needs programming by making resources available for both funding and program development. This emphasis continued; however, the categories of the funds changed to mild and moderate special needs and high special needs.

In 1987 the funding for students with mild and moderate learning needs was rolled into the general funding formula as a block that was based on a per-pupil grant formula; however, ministers continued to identify the total amount included in the general funding for mild and moderate funding. The per-pupil grant was questioned annually in the Legislature, and there were allegations that equal funding per student did not address the needs of some school jurisdictions that might have had a greater proportion of students with mild and moderate needs than others had. The Opposition charged that these concerns undermined equitable resource distribution for special-needs students.

Funding for high-needs students continued to be delivered to school jurisdictions based on the number of students identified with such needs. From 1996 to 1997, because of a cap on funding for high-needs students, school boards that identified new students with high needs did not receive funding for them despite the fact that boards were responsible for providing appropriate programs for each high-needs student. By 1998 the cap was removed after Sloan asked Wiebe to research the need for and efficacy of the high-needs program and its funding.

The formative years. Hyndman believed, as did Hawkesworth, that education in the formative years needed additional support. As a result, ECS funding was introduced in 1973 and increased steadily to provide children across Alberta with improved access to early childhood programs until every child in Alberta had access to ECS by the 1990s. Although some may argue that providing funding for ECS itself is not an effort toward achieving equal educational opportunity, that is what happened: Between 1973 and 1996 children steadily gained the opportunity to access ECS programs in their home communities.

The education budget, which included ECS, was reduced in 1995. ECS funding was cut by 50%, which was a blow to equitable access for kindergarten-aged children. Some school boards chose to take money from their instructional budgets and put it into ECS. Others levied a tuition fee and limited some children's access, and still others reduced the ECS program to 200 hours from the 400 that had previously been provided. This measure was seen to be so egregious that in 1998, under Minister Mar, funding was increased to a level close to pre-1995 levels, which was an example of students' regaining equity that had been lost.

Program Unit Grants (PUGs) were introduced in 1983 for children at a preschool level who had severe learning difficulties. This initiative addressed the needs of such students early, improved their readiness to learn in school, and provided access to preschool and kindergarten programs, thereby improving equity.

Another initiative implemented in 1973 to bolster elementary education was the EOF that Hawkesworth designed. Whereas Hrabi contended that it was not a program that was designed to improve equal educational opportunity, others argued that the EOF did improve opportunity for students because teachers used the funds to design local programs to address the unique needs of their students, which thus improved equity. The EOF grew in popularity and was successful to the point that it was expanded to include a junior high EOF program. It was discontinued in 1987 as part of the cutbacks in government funding, which, some would argue, resulted in a loss of equity for students.

Hyndman began to speak about changing the ratios and narrowing them between elementary and secondary students in 1974. He saw that elementary schools needed more funding than did secondary schools for greater equity. After Koziak became minister, the ratio changed in 1976 to 1.0 for elementary and 1.2 for both junior high and high school students, which brought elementary funding closer to that of high schools. Although all of the documents reported that this change improved equity for elementary students, Koziak said in his interview that the ratio improved the amount of funding for elementary students out of necessity. In 1973 when all new teachers were required to have four years of education to receive a teaching certificate, it meant that they were coming to school with improved credentials, which required an increase in their salaries. Therefore, elementary school costs went up, and funding from the government needed to increase to make up for the increased costs. The improvement in equity between elementary and secondary grades narrowed primarily because the qualifications for elementary teachers improved and more closely matched the previously higher qualifications of teachers who taught high school classes. Between 1971 and 1994, the last year that this statistic was reported in the annual report, the percentage of teachers with four or more years of training had increased rapidly from 70% to 88% by 1978 and held steadily at 90% in 1994. Hence, it can be argued that more students had better qualified teachers in 1994 than they did in 1970, which could be interpreted as improved equal educational opportunity for students regardless of their grade level.

Funding for technology. All of the Ministers of Education saw technology as a means of resolving the problem of student access, regardless of where they live, to comparable and appropriate programs and instruction of a high quality. In 1974 the Department began to promote educational television, followed by computers in 1980, and distance education in the 1990s. These initiatives were all seen as hopeful in addressing the question of equal educational opportunity. However, those interviewed had varied opinions on their success. It can be concluded that technology might help to improve equitable access to programming for students, but technology is expensive and has not replaced the efficacy of face-to-face instruction by a qualified teacher.

Local School Board Taxation

Supplementary requisitions. Local school boards used supplementary requisitions to augment the government funds that were available to fit the local circumstances. Often supplementary funding was also used to buffer the effects of the government's revenue variations, such as the 0% increase of 1984 or the 3% decrease of 1987. Poor school jurisdictions suffered far more from these variations of provincial revenue than the wealthier school jurisdictions did because the poor boards had little fiscal capacity to take up the slack. Further, the wealthier school jurisdictions were able to address the local demands of student and program needs by gaining revenue from improved property assessment, whereas the poor jurisdictions lacked proportionate property assessment and could not respond as readily. After 1973 the Department provided guidelines on the maximum that boards were allowed to levy against property. A plebiscite was no longer required; however, the electorate could petition the school board if voters wished to question the supplementary levy. No petitioners came forward, and, effectively, there was little that hindered school boards from increasing supplementary requisition levies. Hrabi recalled that supplementary requisition levies skyrocketed from 1975 until the early 1980s and fiscal equity "went down the drain."

Taxing the corporations. Corporate taxation was a lucrative revenue source for those school jurisdictions with corporate activity. Beginning in 1977, corporations, like residential taxpayers, declared their taxes for either the public or the separate school systems in their jurisdiction. If the corporation did not declare their taxes for one or the other, they went only to the public school system. Not until Betkowski's revision of the School Act in 1988 was the undeclared tax revenue shared proportionally, if there was a public and a separate school jurisdiction, based on the number of students in each jurisdiction. Although Koziak's and Betkowski's measures to improve fiscal equity between the public and separate school jurisdictions helped to do so within the jurisdictions where corporations had set up business, those without corporate activity faced disparities.

Catholic school jurisdictions tended to be geographically small because of government regulations that made it difficult for them to expand their borders. If a corporation was located close to a Catholic separate school jurisdiction, the school jurisdiction gained no tax. Through amendments to the School Act in 1977, Koziak allowed these jurisdictions to expand into neighbouring areas if they touched the other area on one boundary and the area had potential Catholic school supporters. Some Catholic jurisdictions gained corporate tax revenue, whereas others were never able to. As a result, the fiscal inequities improved for some, but not for others. The measures that Koziak and Betkowski put into place mitigated the fiscal inequities, but the problem remained and grew as the provincial economy grew.

With pressure from poor, fiscally disadvantaged school boards and from municipalities that felt the pressure on their tax base, the government worked on a resolution to the inequities in corporate taxation. Betkowski in 1987 and 1988 and then Dinning promoted efforts to pool corporate tax revenue. When Dinning left the Department to become Provincial Treasurer in 1992, he maintained the belief that the solution to fiscal equity in education lay with corporate pooling. He had a supporter of the idea in the new Minister of Education, Jonson. As a result, corporate pooling became a reality in 1994, along with pooling all of the residential property tax. This measure attained the greatest fiscal equity experienced in the province, according to all of those interviewed.

In the autumn of 1993 Jonson and Bosetti discussed their proposed budget with Dinning in the Treasury. They and the Treasury committee established a long-term solution to the fiscal equity problem: The province would take over all revenue generation from the local school boards through the Alberta Education Levy, which was to be collected on behalf of the government to help fund education in place of school boards' supplementary requisitions and corporate tax collection. The legislation for this change was passed in the spring of 1994. A new equalized assessment for property across Alberta was soon implemented, which helped to improve the level of fiscal equity for taxpayers.

According to all of those interviewed, equity had been achieved for the taxpayers of Alberta in the education tax that they paid. The province received the tax revenues from the municipalities and placed the revenue in a trust fund called the ASFF to show that the funds were to be used only for education. The government added funds from general revenue as it had always done and included them in the ASFF. The funds were distributed to school jurisdiction for instruction based on a per-student equalized formula. They were also enveloped and distributed for transportation, central office support, and facility operation and maintenance. Equal funding provided a foundation of support for students regardless of where they lived. With regard to the delivery of programming to students, those interviewed did not agree that equal educational opportunity resulted.

A number of school jurisdictions, particularly those in urban areas, experienced a loss of funding per student under the 1995 formula. Although the funding for school boards became equal for all students wherever they lived, the resident costs of educating them were not reflected in the funding. The Department officials whom I interviewed—current and retired—agreed that there was still a challenge to improve funding that reflected the cost of education for each school jurisdiction. However, there was no consensus on what caused the problem and what the solution might be. Hrabi and Duke felt that the formula needed to address the complexities of the issue and that simplified funding formulas put into place in 1995 resulted in blocked funds that ignored the complexities of delivering equity. Wiebe and Bemount agreed that the formula needed to be simplified and that the equity funds should be blocked and applied equally, thereby improving equity. Furthermore, there was no consensus on what caused the variance in costs. Some saw the average cost of teachers as a significant variable, whereas others saw the cost of operations and maintenance as causing a problem of inadequate funding from government. There was always the question, Is funding adequate in reality? Jonson and Mar believed that it was. Mar maintained that the question that should be asked was whether funding was *appropriate*—targeted properly to meet the needs of students—not whether it was adequate. However, King and Betkowski questioned the adequacy of funding.

Another issue that affected adequate funding was the phasing out of the Machinery and Equipment tax, a lucrative source of revenue for education, in 1996 because of an effective lobby that the petrochemical industry had launched at the time that Klein became Premier; it was completed in 2000. It meant a loss of $100 million in revenue for the province that had been used for education. Although it did not affect equity, it did affect adequacy because the lost revenue meant less money for education. Moreover, there was little interest or political will, in light of the budgetary cuts that were occurring at the time, in replacing it with general provincial revenue. Bosetti decried its loss but felt that the goal to reduce the deficit took precedence over this one issue.

Between 1995 and 2003 the funding formula changed little. Some minor changes resolved the reduction in ECS funding in 1995 and increased the funding levels to allow

450 hours for students. The 1996 cap on funding for high-needs students was removed in 1998 so that all identified students were funded. Transportation funding was adjusted to better reflect the local school jurisdiction's costs.

It is interesting that just as this research was coming to a close in September 2004, a more complex formula (see the example in Appendix I) was implemented to fund a number of categories in an attempt to improve the equity between students and their various needs, whether they are learning, social, or economic needs or related to where they live in the province. The new formula does not address two major cost drivers identified by Tom Olson, a director of School Business in Parkland SD who was quoted in Chapter Four—the average cost of a teacher, which varies significantly across Alberta—and Wiebe—the deficit found in the school jurisdictions' infrastructure.

Governance and Court Decisions

Although not fiscal in nature, the government addressed the issues of fiscal equity and equal educational opportunity through legislation and regulation that provided the underpinnings for what happened in the drive for equity.

Local autonomy. Each of the Ministers of Education dearly held a belief in local autonomy for school boards, and they openly defended it, from Hyndman to Betkowski, with the minor exception of King, who did not see the school boards as autonomous but rather as interactive with the Department. Nevertheless, this concept of autonomy was kept securely in the School Act in every amendment from 1971 to 1988. During his tenure as minister, Jonson spoke of school boards' having autonomy, but autonomy that was limited to operating the school jurisdiction within the boundaries established for enveloped funding.

Management and Finance Plan. King saw measures such as the MFP implemented in 1983 as promoting equity for students. He was hopeful that the MFP would create a more uniform set of school systems across the province as a result of policy that each school board was expected to establish. The policies were established, but equity did not improve, in King's opinion.

Amendments to the School Act. Betkowski and her predecessor, Dinning, both believed that the 1988 School Act improved equity by giving every student access to an education in the home school jurisdiction. Although access was guaranteed, the funding required to deliver the appropriate program to provide equal educational opportunity varied widely from school jurisdiction to school jurisdiction. The 1988 School Act did not result in the hoped-for equity.

1982 Canadian Constitution. A challenge under the Canadian Constitution and the Bill of Rights affirmed equitable access for students to francophone education in Alberta. This came about first in 1983 when three parents sought their French language rights under the Charter; the government granted their children access to an education in French. A Supreme Court decision in 1990 on francophone education rights provided students access to francophone schools run by francophone school boards. These improved equitable access for francophone students.

1994 changes to the School Act. In 1994 Jonson guided the amendments to the School Act through the Legislature that brought about the reduction of school jurisdictions from over 180 to 62. Some argued that this did not extend fiscal equity or equal educational opportunity, but Jonson had an underlying belief at the time that larger school jurisdictions would improve students' access to a broader range of choices, particularly in high school. He also believed that it would reduce costs. This did not prove to be the case because distances in rural Alberta prohibited students from gaining better access than they had previously had to a broad range of programming, and the reduced costs were never fully realized.

The act gave students the right to attend any school that had space; the funding followed them and improved student access to schooling. The question remains as to whether students actually gained improved equal educational opportunities; it can be argued that choice undermines equity.

Court decisions. One court decision with a long-lasting effect that improved equal educational opportunity was Carriere vs. County of Lamont. Handicapped students' access to their home school was guaranteed. What followed was the government's acceptance of this precept by providing funds for all students, regardless of their circumstances, to attend their home school. Ultimately, the decision can be seen to influence not only the integration of special-needs students into their home schools in the

1980s, but also the inclusion of such students into regular classrooms in the 1990s. Access took on full and complete meaning because these students were treated fairly and given equal educational opportunity.

In Summary

Over the course of 30 years the government used a number of different methods in its attempts to achieve fiscal equity for taxpayers, and by 1994 it was successful to a large degree. With regard to students' having equal educational opportunity, this goal has yet to be reached; Although it has been improved, some have questioned whether the changes in 1995 increased student equity or caused it to decrease. However, as a result of the changes in 1995, school boards have received equal basic funding, although many have experienced a decrease in funding from what they had received prior to 1995.

Question 4

How is the 2000 funding framework (a) an improvement over previous frameworks or formulas and (b) meeting the challenge of providing fiscal equity for school jurisdictions?

Not everyone interviewed answered this question because of lack of knowledge about what happened or having forgotten events that had occurred with regard to equity while they either served as minister or worked in government, and the answers of even those who gave opinions often lacked the richness that reflected their lived experiences when they served in government.

Fiscal Equity

All of those interviewed overwhelmingly responded that fiscal equity targets had been achieved and resolved with the 1995 funding framework, which was largely the result of pooling the corporate education taxes and redistributing them equally to school jurisdictions. Speaker explained that Premier Brownlee achieved provincial control of the mineral resources in Alberta in 1931 for the purpose of sharing the benefits from those resources equally with all Albertans. Corporate pooling was a measure that accomplished that goal, in Speaker's opinion, and served all students equally well. However, O'Brien raised a concern that the geographic areas that benefited most from their corporate tax base often had higher costs of living and doing business. To take corporate funding away from these areas while returning only a smaller, equalized share for education resulted in school jurisdictions' suffering a shortfall because of their higher costs. Other than the sparsity and distance grant, which may or may not apply, there has been no provision to resolve the shortfall.

When school boards lost the ability to levy a supplementary requisition, they saw the government's move as undermining their autonomy; however, taxpayers across the province supported the move because, for the majority, their tax payable to the ASFF was reduced based on the improved equalized assessment, which better reflected the marketplace, according to Bosetti, Hyndman, Jonson, Mar, and Palmer. Betkowski expressed concern that Jonson's move to take the supplementary requisition power away from school boards reduced local government flexibility to meet students' needs. King was apprehensive because this, combined with regionalization, which creates larger school jurisdictions, would decouple or distance local communities from their former local school boards.

Equal Educational Opportunity

Bemount, Bosetti, Dinning, Jonson, Mar, and Wiebe believed that the equalized formula in the new funding framework improved basic education for all students, regardless of where they lived. However, only Jonson, Bosetti, and Wiebe felt that the equalizing effect of block funding for mild and moderate special needs and enveloped funding for instruction improved equity for students across Alberta. Others interviewed did not necessarily disagree, but they saw the funding formula as needing to be improved to meet their expectations for equal educational opportunity. For example, Palmer contended that although the objectives of equal educational opportunity had been met, some "tinkering" with the formula was still required in response to changes that might occur. Sloan explained that the Department often made exceptions to the original funding formula in response to political pleas from MLAs, particularly with buildings; he believed that such political practices would decrease equity for students.

Betkowski opined that increased choice as a result of amendments to the School Act and improved funding for private schools and charter schools actually decreased student equity. Further, she asserted that improved choice actually undermines public education.

Students in distant or outlying schools, according to Wiebe and Bemount, might have their equity improved with the 2000 funding framework. However, those students should never expect the programming offerings and delivery available in a large city because the costs would be prohibitive for the provincial system to make such an improvement across the province. There are limits, and the outliers cannot expect the same level of service, Wiebe argued.

Things are never perfect. The 2000 formula might be as close as it can get to equity for students, Clark and Bosetti agreed, but there should still be some room for minor adjustments. Neither of them speculated on what they might be.

Question 5

What improvements can be made to achieve fiscal equity and equal educational opportunity for students in Alberta public schools?

Not everyone answered this question. Those who did were often vague and responded without the rich background that they had provided in the previous questions. Although it was not directly stated, the majority appeared to be concerned that if they suggested substantive corrections to a funding framework about which they were not knowledgeable, they might not be doing service to the question. In some instances they might have wanted to support the government and therefore did not offer any strongly worded criticism.

Fiscal Equity

Corporate pooling needed to continue as it had been established. It was seen as a fair and reasonable way to share wealth with all Alberta students. No one suggested changes.

According to O'Brien, school jurisdictions with higher costs of living are not usually those that are at a distance from large centres or sparsely populated. With the equalization of funding, these school jurisdictions did not necessarily receive adequate funding to cover their higher than average costs. He believed that a factor must be introduced into the formula to address this need.

Wiebe and Bosetti saw the government's takeover of the property tax levy as the right thing to do. They were clear that no part of the supplementary requisition should be given back to school boards other than through measures allowed in the School Act; that is to say, by plebiscite. Wiebe explained why: (a) Taxpayers would not accept any increase in taxes, (b) municipalities are opposed to school boards' gaining back any taxation powers, and (c) the school boards that were poor prior to 1995 would not wish to have any form of taxation power returned that would put them in competition with neighbouring school boards with greater fiscal capacity. Bosetti, Dinning, King, and O'Brien did not share this opinion but felt that all school boards should be given the ability to raise a supplementary levy from at least the residential property assessment without going to plebiscite. This would allow school boards to regain a real level of autonomy—that is, control and authority—to deal with local demands. To do this, O'Brien stated, the government would have to spend some of its political capital. King believed that giving school boards back the right and opportunity to tax would help boards to reestablish the trust of the electorate.

Deteriorating infrastructure is a challenge for school boards because the funding reductions after 1995 did not allow buildings to be maintained at acceptable levels and new schools to be built where needed. O'Brien and Wiebe saw a severe need to address infrastructure to achieve an acceptable level of repair. Wiebe said that for some school boards, infrastructure requirements cause a higher than average expense, which also results in inequities for students. One way to improve equity in school buildings and facilities, in Sloan's opinion, would be to hold firmly to the regulations and not allow political exceptions as he has seen happening since 1997.

Funding for small schools needs to be reintroduced. Many small schools exist out of necessity, often because of long distances and transportation times to other schools. Because the small schools cost more to run, Wiebe suggested that funding from the government compensate for these higher costs.

Equal Educational Opportunity

Equal educational opportunity—in a word, *equity*—will always be accepted by the taxpayer and electorate, in Hyndman's estimation, as an important element of education. The community understands and accepts that some students require more resources, and this needs to be promoted and kept in the public's eye to retain their support.

Equity is not a simple concept. To address equal educational opportunity adequately, the government needs to move away from a block-funding approach, according to O'Brien and Duke. There are many different issues that need varied levels and types of resources. One size does not fit all as a block fund suggests. A complex funding formula with a higher degree of sophistication than there was in 2000 is required to deal with complexity.

Bemount pointed out that, as of 2003, Alberta teachers were the highest paid in Canada; however, the school boards that employed them received funding in the mid range compared to those in other provinces. He saw this as disjointed, and it may be implied that funding needs to better cover costs related to teachers' salaries. No one else addressed this as a problem; some avoided acknowledging that any inequities existed in 2000 related to teacher-salary costs.

Mar proposed a better balance of resources between "severely normal" and special-needs students. Although he was the only one who raised this issue, his comment was congruous with Dinning's, who believed that "severely normal" students need attention too. Jonson suggested that one way to improve the instructional environment for both regular and high-needs students is to return to a model that favours a segregated classroom environment where special-needs students are taught in their own classroom rather than in one that supports inclusion.

Summary

"Did things change?" in education, with respect to equity. It is obvious that things did change—not only fiscal equity, but also equal educational opportunity. Albertans changed their expectations, and the politicians tried to respond to their constituents.

Hyndman was instrumental in beginning to address special-needs education. His efforts were maintained and extended through each successive Minister of Education until Betkowski's tenure. The courts and the Canadian Constitution helped in defining who would be dealt with equitably, whether it was special-needs students, separate school jurisdictions, or parents who wanted their children to attend francophone schools. Equity improved for early childhood and elementary education under the PC government following Hyndman's introduction and promotion of new and increased funding that encouraged school boards to participate in educational programs for the "formative years."

Jonson, Dinning, and Bosetti appear to be the primary players in the significant changes that took place in governance and funding in 1995. Fiscal equity gained the most attention in this era as the government grappled with deficit and debt reduction. Although these three individuals would argue that the equal educational opportunity was not forgotten and was addressed adequately, there appear to be questions about the effectiveness of the Department's efforts to make equitable provisions for the education of special-needs students and to deal with the varied costs of educating students across the province. Equal levels of funding, although an improvement for many school jurisdictions, have not produced equal educational opportunity to the same degree that they have for fiscal equity.

CHAPTER TEN:

SUMMARY, IMPLICATIONS, AND REFLECTIONS

Fiscal equity is the first approximation of equal educational opportunity (MACOSF, 1975, p. 5), according to Hrabi. Without financial support from the government, the opportunity for all students to have access to an education would diminish to the point that equity would exist only at the commutative equity level. Hence, only the wealthy could afford to send their children to school. However, with the intervention of a government that provides a fair funding framework, the goal of equal educational opportunity may become a reality, given a funding framework that acknowledges the different costs incurred by school boards and the students that they serve. The elements of a successful funding framework, one that can be identified as positivism equity, as Alexander (1982) called it, would ensure that all children have universal access to education and that all are guaranteed a high quality of educational opportunity that meets their educational needs rather than a funding framework that makes the public offering substandard and inadequate encouraging wealthy parents to choose private schooling for their children.

The public educational effort in Alberta began in 1883 with the North West Territories Act. The legislation of the day, An Ordinance Providing for the Organization of Schools in the North West Territories, exceeded the commutative model of equity; instead, it set out a legislative framework that provided distributive funding through local taxes, and the model acknowledged public intervention. Therefore, all children should receive an education at no cost to them; rather, the government and local school board should pay for it. Over time, this legislative funding model changed to one that may be identified as *restitution equity*, in which after 1961 when the SFPF was put into place, politicians enacted a funding framework that contained a few of the elements of Alexander's (1982) positivism equity.

Although the research has focused on a period during which the PC government has held power, from 1970 to 2000, it revealed that the genesis of fiscal equity and equal opportunity can be found in the history of the North West Territories and, subsequently, Alberta. This genesis led to funding frameworks that came into use well before the PC government's time and dated back to the Socreds, the UFA, the Liberals, and the declaration of the North West Territories Act of 1875.

Overview of Events and Observations

Hyndman and the Department officials who worked with him gained the support of the Alberta Legislature in addressing preschool and elementary education. They came to the task with a set of beliefs that included equity and fairness and had been influenced by a successful election campaign that recognized parents' and teachers' pleas that children with handicaps be part of the funded public school system. Hyndman believed that the preschool and elementary years were the most important in a child's education. He paid close attention to education in two areas, for handicapped children and for preschool children up to the sixth grade, which in his interview he called the *formative years*. As a result, frameworks were designed with specific program grants that supported and encouraged improved special-education programs and elementary educational opportunity for students. The frameworks included raising teacher certification standards by improving the level of teacher preparation for all teachers, not just for high school teachers who had previously been expected to have a degree. Now, all teachers were to have at least four years of university education. Handicapped children in both institutions and special classrooms received additional attention through special funding grants to school boards to support such instruction and provide diagnostic tools for these students. In addition, Hyndman narrowed the gap in the factor of funding levels between elementary, junior high, and high school, which in effect raised the funding levels for elementary programs. Fiscal equity was further improved as the Department began to introduce an equalization grant to compensate school boards that had a poorer property tax base. To establish the Department's agenda and come to decisions about its concerns, Hyndman set in place a research arm in addition to consulting with the academic community and other stakeholders in education.

Koziak completed the work of narrowing the funding gap between elementary, junior high, and senior high school in 1976. He also introduced the equalization grant that Hyndman had proposed. Koziak established a growing number of grants to help offset the fiscal constraints of some of the poorer boards because of their low property assessment. He also improved fiscal equity for separate school districts when he allowed corporations to declare their taxes for either the public or the separate school district. In addition, he provided a method for separate school districts to more easily expand the boundaries of their districts and capture a wider tax base. Koziak brought his experience as a lawyer to his position as minister: He focused on doing the best that he could for the client. His clients, both students and their parents, continued to influence him through MLAs in the Legislature. Individuals and groups brought concerns to the government, amongst them concerns about education. In the "golden era" when oil and gas royalties provided sufficient money to fund new programs, how could he refuse to address the concerns bought forward? Koziak asked.

King maintained the measures that had been established to provide equal educational opportunity and fiscal equity. Early in his tenure as minister, King responded to the Carriere court decision, which established that handicapped students could attend their home school without impediment. As a result, the Department responded to school districts that complained that their lack of resources hindered their compliance. The Department improved the resources for handicapped students. In concert with the Canadian Constitution (1982) and the accompanying Canadian Bill of Rights (1985), the court's decision positively affected equity for the handicapped; however, it meant that educational costs increased. An Alberta Supreme Court decision, based on the Canadian Constitution, also improved francophone educational rights in 1983, and children were given the right to receive a francophone education. However, francophone education was limited to locations where there were a sufficient number of students. King began to review the School Act during his ministry, and the review resulted in a major revision in 1988. During Premier Lougheed's leadership, King said that Lougheed believed that everyone should be listened to and effectively heard; everyone had influence when it came to setting government agendas. This included the Opposition. Even though only four MLAs formed the Opposition during the years that King was minister, *Hansard* (Legislative Assembly of Alberta, 1979, 1980, 1981, 1982, 1983, 1984, 1985, 1986) suggested that they were heeded on issues related to education and equity. King prided himself on his effort to listen and debate education issues of the day with all stakeholders. Nine equity grants were created to deal with a variety of funding shortfalls that school boards faced. A number of them complained that these funds were complex and needed to be simplified. The grants were then rolled into a single equity grant in the same year that the government's grants to education were held to a 0% increase. During King's tenure as minister, the phrase *equal educational opportunity* was replaced in political circles with the word *equity*.

Betkowski brought beliefs that were similar to those of King to her position as minister. She avowed to meet with and listen to stakeholders in education. As a new mother, Betkowski viewed many of the issues through maternal eyes. This was most evident when she worked with her Department and the Legislature as she guided a major revision of the School Act through the Legislature. She believed that children must have the right to be treated equitably in their education and that this begins with having access to their local school. It is interesting that during the preparation for amendments to the School Act, she also attempted to bring the UN Rights of the Child to the attention of her caucus and sought their support, only to be turned down. In the Legislature she listened to all who spoke—government and opposition alike—to the issues for which she was responsible in education, and the School Act was amended based on the debate. This was also the case when the Department's budget was being debated in meetings of the Committee of Supply. Betkowski and Dinning, who followed her as minister, confirmed that under her direction the School Act focused on equity for students. To assure equity for all students, she believed that she needed to ensure that all students had access to an education regardless of where they lived and what their abilities or handicaps were.

In 1987 Betkowski was required to reduce funding to education by 3%, but she increased funding for special-needs students. She regretted that she had been unable to implement corporate pooling despite her sincere efforts to do so. She and Bosetti saw corporate pooling as a way to address growing disparity between the poor and the wealthy school boards. Betkowski's efforts failed in caucus after difficult debates that tended to split the caucus, and those who opposed corporate pooling won the day. It is interesting that as early as 1987 MLA Halvar Jonson championed corporate pooling during the debate on the education estimates and implemented it in 1995. The mild and moderate grants for special-needs education were rolled into the SFPF; however, subsequent Ministers of Education reported them as the portion of the SFPF that this grant represented.

Dinning inherited the growing problem of fiscal equity amongst the school boards that was caused by a varied tax base, whether it was corporate or residential. Dinning recalled traveling with Department officials across the province to meet with school board trustees in an effort to reach consensus on models to resolve fiscal inequities amongst the boards. He was unsuccessful despite his attempts to hear all sides in the hope of achieving an acceptable compromise. The disparities continued to increase, and the importance of the types of research that had been conducted under Hyndman waned during Dinning's tenure. The MACOSF had not met since 1981. By Dinning's time research appears to have become governed more by politics and MLA committees than by empirical research, according to Duke. Instead of in-depth and broad research, the Department's discussion papers began the rounds with Betkowski and continued with Dinning.

Jonson inherited the fiscal equity problem when he became Minister of Education. A second problem, an annual deficit and the growing provincial debt, plagued the government throughout the 1990s and became an issue in a hotly contested party leadership campaign in which Klein defeated Betkowski. Klein became Premier and called an election in 1993, campaigning on a platform of eliminating the government's deficit and debt. Jonson was one of Klein's supporters in caucus; as Minister of Education appointed in 1992, he accepted the challenge to eliminate the deficit and debt. Jonson met with Treasury, which Dinning chaired, in 1993 and had the support of Bosetti in dealing with the fiscal equity issue. However, Bosetti opposed the education budget cut of 20%; he did not see how school boards could continue to operate with such a severe cut to government funding. In the meeting the Treasury resolved the fiscal equity problem by implementing corporate pooling, taking over all taxing authority from the school boards, and implementing the new equalized assessment scheme. It was agreed that education would experience only a 12.6% cut to its budget. When the plan came into effect in 1995, property taxpayers in many cases experienced a drop in their tax bill for education.

The Department also developed a new fiscal framework in 1994 that distributed funds in envelopes for instruction, facilities, transportation, and administration. A sparsity and distance grant continued to assist those school districts with higher costs because of their distances from major centres. High-needs students remained funded by the government; however, the grant was capped, which meant that there was no funding provided beyond a specified number of students. Therefore, these additional high-needs students did not qualify their school boards for the additional funding. ECS funding was cut by 50%, which left school boards with the option of reducing their program, charging tuition fees to keep it, or supplementing it with instructional money. Although equal funding at a reduced level from the previous year was provided for the regular student, the public and the Opposition raised another issue: adequacy. The Opposition questioned whether the new funding framework was equitable for students and school boards. Jonson and the government did not relent or respond to the repeated questions and demands in the Legislature, and the Opposition made no headway in the Legislature in changing the government's policy. Debt reduction drove the decision to pool all education tax sources; Jonson's and Dinning's resolve to fix the fiscal equity problem was successful according to those interviewed. On the other hand, the question of equity for students and adequacy remained during Minister Mar's tenure.

Mar maintained the Jonson funding framework. He sought no changes to it other than reinstating funding for ECS and removing the cap on high-needs funding. These measures were implemented following a review by an MLA team chaired by Wayne Jacques, a PC MLA. Research was completed as needed. The Opposition continued to question the government on adequacy and equity for funding, to no avail. When Dr. Lyle Oberg took on the portfolio, which now included Advanced Education, the funding formula, with only the previously mentioned changes, remained the same other than for the annual percentage funding increases.

Did Fiscal Equity and Equal Educational Opportunity Change?

Did the concept of fiscal equity change over the period of 1970 to 2000? It appears that the concept and its objectives for government policy did not change appreciably, according to Hrabi and Duke. However, the methods to achieve fiscal equity did change with the introduction of equity grants. In 1995 when Jonson was minister, the government took the authority to tax property away from the school boards and left them with access to tax only through plebiscite—a more significant change to fiscal equity. This method brought about the greatest degree of fiscal equity for the province in its history, according to all of those interviewed.

Equal educational opportunity or equity for students from the time of Hyndman until 2000 did change, in understanding, definition and method of delivery. Initially, when the PCs were first elected and formed the government, equal educational opportunity was an objective for students who were seen as normal; others who did not meet this standard were placed in segregated programs, either in institutions or in special schools within the school district in which they lived. These students who were segregated in the "other" category had mental, vision, or hearing handicaps, and school districts saw little or no obligation to educate them. Late in the 1960s the need for services to those students, including education, became a more urgent issue for their parents, and they learned that their voices had been heard by Opposition PC MLAs. When the PCs formed the government in 1971, early items on the agenda included improving services in education for the handicapped and better defining the term *learning-disabled students*. The change in definition of the handicaps and the special-education needs changed under Hyndman's tenure as minister and was refined under other ministers. Children with handicaps had most often been segregated in an institutional setting. Not until the Carriere court decision in 1978 did the definition change to expect school boards to directly accept handicapped children into their home schools. This change was consistent with the Canadian Bill of Rights (1960) and later reinforced by the Canadian Constitution (1982). The School Act still did not acknowledge such rights of access in the early 1980s; not until 1988 did this element of right of access for students appear in the newly amended School Act tabled by Minister

Betkowski. After the new School Act was declared law in 1988, children with handicaps gained the legislated right of access to regular classrooms. This demonstrated an evolution in the understanding, approach, and methods used to achieve equitable treatment of special-needs students from the time that Hyndman was appointed minister until 1999 when Oberg began his tenure. When Hyndman took responsibility for education, special-needs students were not funded other than through a limited opportunity fund and institutional programs. By 1999 these same students had access to funded programs that were often provided for in the regular classroom in their home schools.

The Effects of Events, Beliefs, and Influences on Equity

As the research revealed, a number of factors resulted in changes to the definition of and the methods used to achieve fiscal equity and equal educational opportunity:

1. The beliefs that individuals, elected or appointed to serve in the Department of Education, brought to their office:
    - Hyndman and Hawkesworth both believed that the preschool and elementary years were important and needed more resources, which led to a change in the funding ratio that increased elementary funding and introduced ECS.
    - A common belief of each minister was that children should have access to education, regardless of where they lived in Alberta or their circumstances. This belief gained Hyndman's attention and support, but was advanced when King initiated changes to the School Act. Betkowski completed the task of making access a legislated right when she guided Bill 27 through the Legislature in 1988.
    - Because of her strong beliefs in the rights of children, Betkowski accepted the UN Resolution on the Rights of the Child and promoted it (unsuccessfully) within caucus. Nonetheless, she guided a major revision to the School Act through 1987 and 1988. The new act focused on students and ensured access to an education.

2. The circumstances that led to decisions and influenced the direction that the government took:
    - In 1970 and 1971 parents and teachers pressured the Socred government to improve services and access for children with handicaps. Instead of the Socreds' responding, the PC Opposition listened and developed policy based on what they heard. In part, that listening to parents and teachers likely contributed to their forming the government because they responded to the demands.
    - Jonson and the government addressed fiscal equity in 1995 based on a prolonged debate to resolve the fiscal disparities amongst school districts. With the government seeking to reduce deficits and debt, Jonson as Minister of Education and Dinning as Provincial Treasurer acted to equalize funding by taking over the responsibility for collecting property and corporate taxes for education. If that had not happened, the reductions in government funding to education might have severely crippled the poorest school districts.
3. The court decisions, the Canadian Constitution, and the Canadian Bill of Rights that influenced government responses:
    - The Carriere court decision influenced the direction that the government took in funding and providing opportunity for all students, regardless of their handicap, to attend their home school. This decision appears to have ensured that handicapped children would be integrated into their home school. Further, the Canadian Constitution of 1982 contributed to ensuring that children with handicaps are included in regular classrooms as a norm rather than as an exception.
    - Francophone education was advanced because parents challenged the government through the courts under the Charter of Rights and Freedoms. When the court decided in their favour, parents won the right for their children to be educated in a francophone school.

- Nine school boards challenged the government through the courts, alleging that the funding framework of 1993 caused severe fiscal inequities that disadvantaged poorer school jurisdictions in relation to wealthier jurisdictions. The court case never made it to a full hearing because the court deemed that the nine school boards lacked jurisdiction to make a complaint. The challenge may have influenced Jonson, the minister, and Bosetti, the deputy minister, in the measures that they took to Treasury in the fall of 1993 when the initial decisions to change the funding structures for education were made. These structural changes included the move in 1994-1995 to take over both property and corporate education taxes and to pool them into the ASFF for equal distribution.

4. Research and the political process that influenced the Department's decisions (Figure 9 illustrates this change in influence):

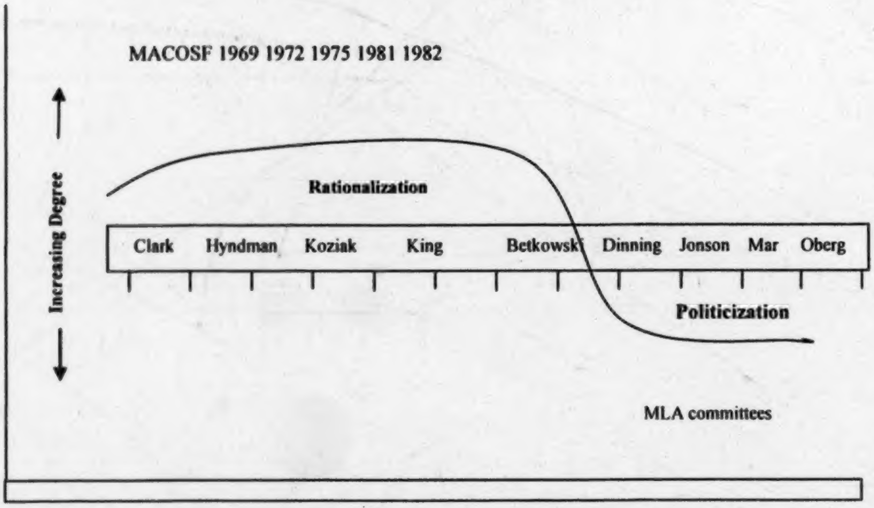
MACOSF 1969 1972 1975 1981 1982
Increasing Degree
Rationalization
Clark
Hyndman
Koziak
King
Betkowski
Dinning
Jonson
Mar
Oberg
Politicization
MLA committees

Figure 9. Attention to the approach to decision making.

- Duke recalled that Hyndman began a period of rationalization when he budgeted for research activity. Hyndman also continued Clark's earlier practice of establishing an advisory group to the minister made up of stakeholders and academics. The reliance on empirical research continued into the mid 1980s; the MACOSF met and delivered reports in 1969, 1972, 1975, 1981, and 1982.

- As the emphasis on empirical research waned, as shown in Figure 9, and the Minister's Advisory Committee was disbanded. It appears that the process of decision making within the Department became more politicized in the early 1990s. Roundtables on education in 1993 and the Jacques Committee that studied equity in education in 1995 and again in 1999 were examples of politicization because they involved politicians and the public rather than empirical research. The new research from Dinning's tenure forward was conducted to make spot checks, such as Sloan's request that Wiebe determine whether high-needs funding was effective and deserved to have the cap removed on funding.
- Prior to the PC government, the legislative debate and delegations to cabinet and the legislative debate had influence on the Socred government. The influence shifted to caucus, the Legislative debate, individual MLAs, and the Opposition during the tenures of Hyndman, Koziak, King, and Betkowski. These groups had considerably less influence on Dinning, Jonson, and Mar. Often in *Hansard* the first four ministers listed above received suggestions from the floor of the Legislature during debate and question period. Jonson and Mar, on the other hand, appeared defensive to Opposition questions about the government's direction, following Klein's announcement in his January 1993 televised broadcast that the government's deficit and debt needed to be reduced. He therefore advised cuts to all departments, including education. Figure 10 illustrates the changes in Legislature influence.
- The emphasis on the 1970 fiscal equity concerns under Clark seems to have changed to an emphasis on equal educational opportunity under Hyndman. This was followed by a long period of interest in equal educational opportunity, or student equity as King described it, until the

late 1980s, when Betkowski's attention shifted to corporate pooling. Because of the provincial debt, fiscal equity gained attention in the early 1990s under Dinning. By 1993 fiscal equity gained further prominence.

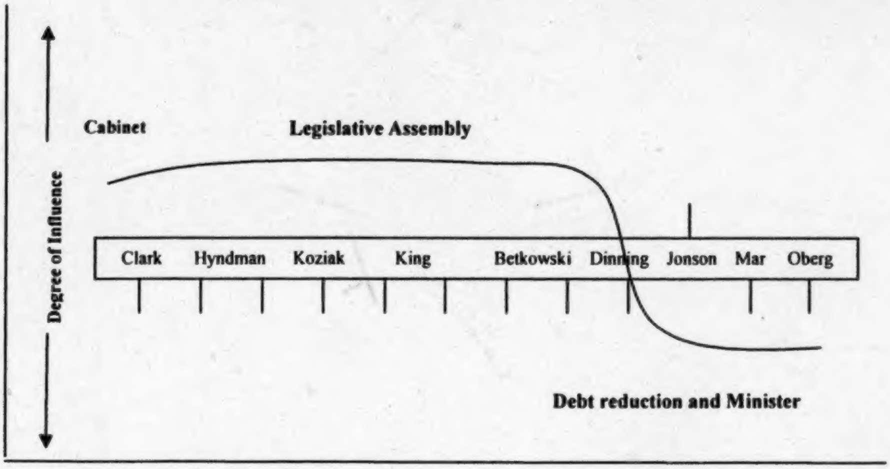

Figure 10. Influence of the Legislative Assembly vs. the government.

This was apparent when Jonson and Bosetti met with the Treasury, chaired by Dinning, and decided that the government would take over property taxing authority from school boards. Although each Minister may be seen as having dealt with both sides of the equity equation—fiscal equity and equal educational opportunity—the evidence suggests that the emphasis shifted from one element of equity to the other quite deliberately in response to the political environment and what each minister saw as most important at the time that he or she was in office. Figure 11 illustrates the shift in emphasis between the two elements; however, during the tenure of each minister each side of the equation did receive some attention.

At the close of the period from 1970 to 2000, the general question asked in the research was, "Did fiscal equity and equal educational opportunity improve?" The information from the interviews and other data that I collected suggested that fiscal equity improved dramatically in 1995 when ratepayers gained greater equity and school boards were funded more equitably under the ASFF. However, in 1995 the school jurisdictions that had become used to the extras that their wealthier tax bases provided were affected by the government's new framework for tax collection and equalization of

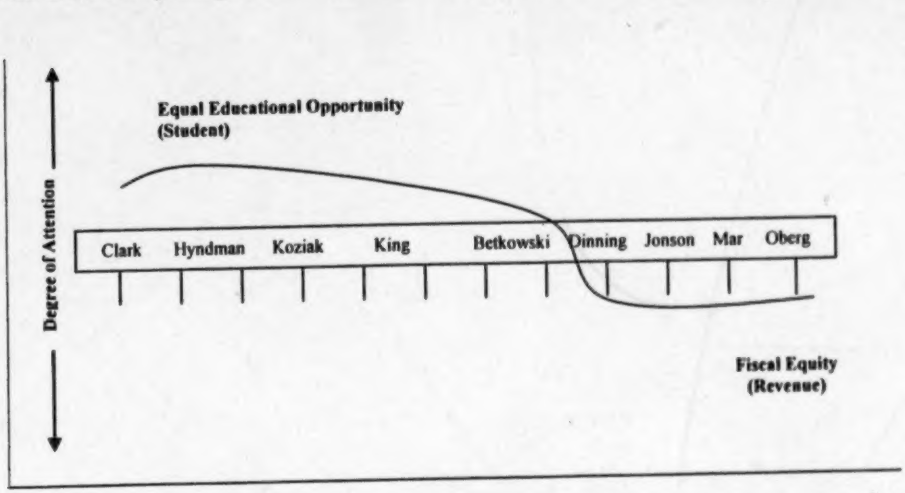

Figure 11. Attention given to the elements of equal educational opportunity and fiscal equity.

revenue to school districts. In turn, after 1995 these property tax funds went into the ASFF and were redistributed equally to all school districts across the province.

Prior to 1995 poorer school boards may have had less demand from parents for student education services than wealthier boards had. In 1995 with the new funding structure, the poorer boards supported the new funding formula that boosted their funding, and the previously wealthier boards lost revenue. Some of the previously wealthy school boards complained that the significant shortfall in funding under the new framework of 1995 caused their school systems to suffer. Although it focused on equalized funding, some, including Tom Olson from Parkland SD (Chapter Four), argued that some of the main cost drivers such as the average cost of teachers, which was not a consideration in the funding framework after 1995, needed to be addressed to achieve full fiscal equity. Increasing facility costs, deteriorating school buildings, and the need for new schools have not been met adequately with funding from the government since 1995.

However, Wiebe claimed that it was this shortfall in fiscal equity in the new funding formula that required attention, not the cost drivers that Olson had mentioned.

Fiscal equity tools, as Hyndman described them, are blunt instruments for funding education and addressing all of its complexities. This problem added to that of the block funding that was initiated in 1984 with equity grants being rolled into one, followed by the enveloped (block) funding used in all of the revenue streams to school boards from 1995 until 2003. It can be argued that block funds make fiscal equity tools even blunter and less flexible in meeting the variable costs of delivering education. With few funds to address the variability with sparsity and distance, transportation, and special high-needs funding, there is not sufficient latitude to address the complexities of delivering equal educational opportunity to students wherever they live and whatever their circumstances.

Reflections

View of the Research

At the outset of the research, following the development of the proposal, I hypothesized that through the government documents I would find the basis that was used to advance and shape equity for students. Initially in my evaluation, fiscal equity appeared to be where the answers would lie. As a result, I spent considerable time and effort in looking at government documents for the answers.

What I learned was that within the government documents the trends in equity were evident, but the depth of detail and purpose for activity were lacking. These documents did not contain the richness of information that I found in the interviews and my review of Hansard. Specifically, the Department's annual reports addressed only the highlights, but did not provide depth of information. Committee reports revealed the thinking about equity and recommendations to improve fiscal equity and equal educational opportunity, but they did not provide information on what actually happened to equity. As the broad-based committees of the 1970s and 1980s changed to MLA task forces' becoming the norm, the language changed from a more academic view of equity to language that was easier to understand but lacked the theoretical depth of the broad-based committee reports.

This research greatly benefited from the interviews, which provided the richest information on why decisions were made and what was seen to be the success of those decisions. Although the interviews were difficult to manage in terms of the consistency in questioning because the interviewees wanted to talk about "many things," they offered the best understanding of the main players in the Department, such as the Ministers and the Deputy Ministers. As I mentioned in this chapter, each level in the hierarchy addressed equity differently, with a different purpose, and often by using different language. This difference in purpose and language could provide an opportunity for more research.

In the event that I was given the opportunity to repeat the research, I would pursue the same types of data. However, I would place a heavier emphasis on the interviews and would seek an opportunity to return to the participants for a further interview after I had completed the first collection of the data and written the summaries of the interviews. This would help me to gain a more thorough understanding of the links between the data and would help the participants to recall the events that had happened, in many instances, over 30 years prior to this research.

Beliefs and Assumptions About Government and Its Pursuit Of Equity

My background as a teacher active in collective agreement bargaining brought certain beliefs and assumptions to the research, which I discussed in Chapter Three. Combining these with my involvement in politics caused me to view the funding of public education through the eyes of a practitioner who believes that there was never enough money supplied to support the needs of students. Second, the efforts of government to address equal educational opportunity appeared to me to be lacking, particularly in the mid to late 1990s. As I progressed through the research, I mellowed in my view that government had not advanced far enough in its endeavour to achieve equity. Trying to change public education in any manner, as Hyndman said, was a slow and difficult process. Traditions and societal beliefs often got in the way of change. It was only in 1994 that the government set about making funding and governance reforms in education despite a concerted public opposition.

I gained an appreciation for the actions that Ministers of Education took, along with their Department, in the effort to improve equity for students whatever their circumstances and wherever they lived in the province. There was a continued effort on the part of each of them to improve equity and an admission that it was a concept that should be pursued but that was unlikely ever to be totally achieved.

The Future and Change Continued

In 2004 the funding framework changed and became more complex: It acknowledged the factors not only of distance, but also of economic need and the needs of Aboriginal students. The amended framework is not within the scope of this study; however, even if it were, it would be too early to evaluate its effectiveness because school boards are not clear on how the formula works. They have argued that the funding that the government promised is not as rich as it appears to be.

Questions for Further Study

The adequacy of funding has not been addressed in this study. Although funding frameworks may be fiscally equitable, they may not provide sufficient funding to meet the educational needs of students adequately. Is there sufficient understanding of what the objectives of education entail to foster a clear understanding of what it will cost, and from that to determine whether funding is adequate? As Bemount pointed out, there is a disjoint between the cost of Alberta's having the highest paid teachers in Canada and the government's funding being in the mid range of all of the other provinces' levels. The costs of educating students vary, possibly just as the cost of living varies across Alberta from small rural towns to cities that are experiencing economic booms. What are the implications for the funding framework if these factors are taken into consideration? How does the education funding framework avoid fuelling inflation in these centres?

The funding framework changed just after the data collection for this study concluded. What effects will the new framework have on fiscal equity and equal educational opportunity? Is there a need to further adjust the funding framework?

Does the concept of equity for students need to be broadened to avoid the limitations of the current definition of equal educational opportunity? Are there new ways to view equity that are not limited by the available funding, or is the available funding what defines equity?

Conclusion

Easy access to key individuals for interview and documentary evidence for the period of 1970 to 2000 provided the opportunity to accomplish the research. The data from documents and the individuals interviewed facilitated an understanding of why policy decisions on educational fiscal equity were made and whether those decisions were seen as effective or not. Additionally, in conducting this research, I attempted to discover approaches that may yet be taken to create a better model for funding a fiscally equitable public education system in Alberta.

From the preliminary historical literature search it was evident that the concept of educational fiscal equity in Alberta was founded in the legislative decisions beginning with the BNA Act of 1867 and followed by the North West Territories Council's school ordinance of 1884. A thread of what can be described as educational fiscal equity appeared subsequent to the school ordinance of 1901, which subsequently was adopted in Alberta in 1905; it ensured that all school age children could attend school without cost, such as school fees and materials. In the event that ratepayers were unable to pay their taxes, school boards could waive their tax payment and allow the children of such ratepayers to attend school. In the early 1900s, schools for the deaf, deaf mutes, and the blind were established. From 1905 into the 1960s attempts to improve school attendance and the qualifications of teachers in rural areas also helped to establish a uniform delivery of educational programs and services to every student throughout Alberta. Where the programs were not available because of the lack of teachers and local resources, tuition agreements between school jurisdictions allowed students to attend school in other jurisdictions as nonresidents and therefore to have access to programs not available to them locally. All of these attempts, however effective or discriminatory, show a real effort to establish the foundation for what is known today as educational fiscal equity.

The concept of educational fiscal equity has evolved over time, beginning in the 1880s with equal opportunity; apparently, this concept grew out of a sense of egalitarianism, a principle of equal rights and opportunity for all (Allen, 1990, p. 375).

The evolution continued through to fiscal equality for both students and taxpayers in the mid 1900s. Finally, the concept of educational fiscal equity was introduced in the Alberta, then the North West Territories, education scene in the 1880s. The effort on the part of the Alberta government has demonstrated a desire to seek equitable treatment for all children of school age in Alberta.

Equity for students, whether fiscal or educational opportunity, was discussed differently in three arenas: the theoretical, which was addressed in the literature (Chapter Two); the practical, mainly in the interviews with the government officials (Chapter Eight); and the political, in *Hansard* and the interviews with the Ministers of Education (Chapter Five and Six). The politicians often used the word *equity* to describe and promote programs—for example, EOF—amalgamation, and the elimination of nonoperating school boards. Department officials more often referred to the theoretical approaches to equity discussed in the literature and did not see the three examples as efforts to achieve equity. In the formation of policy, one may conclude that equity is a word that flags fairness and is looked on favourably by the electorate; hence, politicians may use the word in a broad sense, outside the realm of the theoretical, to gain public support for their initiatives.

What does the future hold for educational fiscal equity and equal educational opportunity in Alberta? It is likely that the future will be based on characteristics related to the foundations that have been established and have evolved over the last 121 years with a steady advancement of the concepts. I hope that this research will add to that understanding and provide some direction for future decisions to improve educational fiscal equity and equal educational opportunity even more.

Although fiscal equity may be the first approximation of equal educational opportunity (MACOSF, 1975, p. 5), the government needs to continue to focus its attention not only on the fiscal side of the equation, but also on the equal educational opportunity side. Student success relies on adequate funding that is finely tuned to the needs of students, regardless of ability, social, or economic situation. Complex needs demand a more complex approach to defining the needs of students in school. Complex needs may require the broadening of funding frameworks to include more aspects of students' lives than simply what happens in the classroom and their scores on standardized tests. Last, the variable cost drivers of which Olson spoke need to be looked at and funding designed to offset these costs in a fair and equitable fashion.

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APPENDIX A:

ACRONYMS

Appendix A: Acronyms

ASBA	Alberta School Boards Association (previously known as the ASTA)
ASFF	Alberta School Foundation Fund
ASTA	Alberta School Trustees Association
ATA	Alberta Teachers' Association
BNA Act	British North America Act
CBE	Calgary Board of Education
CFE	Campaign for Fiscal Equity
CRU	Classroom Unit
ECS	Early Childhood Services
EOF	Educational Opportunity Fund
EP and PL	Electric Power and Pipeline
EPSB	Edmonton Public School Board
ESL	English as a Second Language
LDF	Learning Disabilities Fund
M and E	Machinery and Equipment
MACOSF	Minister's Advisory Committee on School Finance
MFP	Management and Finance Plan
MLA	Member of the Legislative Assembly
PC	Progressive Conservative
PUG	Program Unit Fund
SFPF	School Foundation Program Fund
Socred	Social Credit

APPENDIX B:

LEVIN'S (2002) MODEL TO EVALUATE POLICY

Appendix B: Levin's (2002) Model to Evaluate Policy

Descriptor	Hyndman	Koziak	King	Betkowski	Dinning	Jonson	Mar	Oberg
Social cohesion								
Equity								
Efficiency								
Choice								

APPENDIX C:

SAMPLE PERMISSION FORM

Appendix C: Sample Permission Form

Consent Form

This study has been reviewed and approved by the Research Ethics Board of the Faculties of Education and Extension at the University of Alberta. For questions regarding participant rights and ethical conduct of research, contact the Chair of the Research Ethics Board at (780) 492-3751.

I understand that the information gathered by Ernest Clintberg is part of his research for the purpose of his dissertation. Further, I understand that the information he collects from the individuals he interviews will not be anonymous as what I say may be included as part of his dissertation. However, he is committed to report on those things that I approve and I will have the opportunity of reviewing the transcript of what I have said and the interpretation summary of the interview for the purpose of editing, which includes deleting and adding to the text.

I understand that this research is being done in such a manner as to meet the requirements of the Procedures for Compliance with the U of A Standards of Human research. Further, I give the interviewer, Ernest Clintberg, permission to use the data and content from my interview in his research. This research is being conducted under the auspices of the University of Alberta and must follow the Standards reflected in the GFC Policy Manual Section 66 entitled "Human Research - University of Alberta Standards for the Protection of Human Research Participants." I have been made aware that I have the opportunity to review this document that is available on the University web site at **http://www.ualberta.ca/~unisecr/policy/sec66.html**

I understand that I have the right to:

1. Not participate,
2. Withdraw at anytime without prejudice to pre-existing entitlements, and to continuing and meaningful opportunities for deciding whether or not to continue to participate,
3. Opt out without penalty and any collected data withdrawn from the data base and not included in the study,
4. Safeguards for security of data (data will be kept in a secure place for a minimum of 5 years,
5. The disclosure of the presence of any apparent or actual conflict of interest on the part of the researcher, and
6. A copy of the report.

I am aware that the data and content gathered from my interview may not be confidential. Understandably, this is due to the fact that my position as Minister of Education (or a position related to the educational finance in Alberta) identifies me by the time of my service and the issues that I may be addressing in the interview. While the data is not confidential there is no apparent harm as the data reflects the public decisions that I have made that are for the record. These are decisions that have been available for critique from the time that I made them and I have accepted the consequences of those decisions. However, there is a risk that the public may gain access to this information as it will form the data presented in the researcher's doctoral dissertation. From this knowledge further public criticism may result. In order to mitigate against possible negative criticism, I understand that I will have the opportunity to clarify and edit both the text of the transcribed interview and the summary of my comments prepared by Ernest Clintberg. This will allow me to consider, correct my comments and thereby help to minimize any potential negative consequence.

I am aware that the transcriber employed by the researcher will comply with the Standards. There is no reasonably foreseeable harm expected from my participation in the research. I understand that the researcher will make every attempt to eliminate any misunderstanding and misinterpretation of my interview by sharing the complete text of the interview and his summary of the interview. He will allow me to make corrections, deletions, additions, and clarifications to the information that he is collecting and analyzing as a result of my interview with him.

I am aware that the researcher may use the information gathered in my interview for the purpose of preparing academic papers and related conference presentations.

I, ____, understand the research and its purposes. I consent to being part of the research project being conducted by Ernest Clintberg.

____________________________________ ______________________________

Raymond Speaker Date

Name and contact information for person(s) who may be contacted in the case of concerns, complaints or consequences:

- Researcher
  Ernest Clintberg

- Supervisor information
  Dr Frank Peters
  Policy Studies
  Faculty of Education
  University of Alberta
  Phone: 780 492 7607

APPENDIX D:

THE LETTER OF INVITATION TO PARTICIPATE AND INFORMATION PROVIDED TO THOSE INTERVIEWED

Appendix D: The Letter of Invitation to Participate and Information Provided to Those Interviewed

2003 01 28

Calgary, Alberta
T2J 1Y5

Mr. Raymond Speaker
Enchant, Alberta
T5K 2J8

Dear Mr. Raymond Speaker:

I write for the purpose of requesting an interview with you as part of my research project towards a doctorate.

I am a doctoral candidate at the University of Alberta. The research that I am pursuing is on the Alberta government policy from 1970 until 2000 related to fiscal equity in public education, how it changed, why it changed and how well it achieved the objectives.

My proposal includes interviewing key individuals, such as yourself, who are or have held the office of Minister of Education or a position related to educational finance in Alberta for the above mentioned period of time. Attached you will find a copy of the questions that I will be asking during the interviews. Interviews will be scheduled for an hour.

Following the interview, a transcription and summary of what was learned will be provided to you for the purpose of verifying the accuracy of what you said and my interpretation. You will be invited to make any changes and add any clarification that you wish in order that the information is a reflection of the information you gave in the interview.

In order that this research meets the requirements of the Faculties of Education and Extension Research and Ethics Board, you need to fully understand the purpose of the research and give your written consent to being interviewed. Please find attached a brief description of my research proposal, a list of proposed questions and a consent form.

I look forward to your response either by telephone, email or mail. You can reach me by calling me at my home (phone
or sending a letter to the above address.

If you have any questions of me, please do not hesitate to contact me for clarification. Thank you for considering this research. I await your response.

Sincerely

Ernest Clintberg
Doctoral Candidate
University of Alberta

c. Dr. Frank Peters
Professor
Department of Policy Studies
Faculty of Education
University of Alberta

Overview of the Research Proposal for

CHANGING UNDERSTANDINGS OF EQUITY: ALBERTA'S FUNDING OF PUBLIC EDUCATION (1970 to 2000)

When researchers consider the topic of fiscal equity in education they often do a statistical analysis on the funding arrangements over short periods of time (e.g. five years). Analysis is done to measure the success of related policy changes. This study does not propose such a short span of time; neither does it propose to do a specific statistical analysis on the revenues and expenditures of Alberta school jurisdictions. Instead the study will look at the development of a concept – that of fiscal equity in public education – and consider its origins and evolution from 1970 until 2000 in the province or Alberta. This will allow a discussion based on the recollections of the key people (e.g. provincial government Cabinet ministers who were making the decisions that resulted in school funding policy and regulation).

Today, not only are the documents from the Progressive Conservative tenure in government relatively easy to access, but also the key individual players are still available to interview and to provide the richer understanding of the events and the thinking that occurred to encourage and initiate the changes. With this perspective, looking back through the eyes of the individual key players may assist in better informing the future.

With this information, it will be possible to see why fiscal equity developed the way it did – what the successes and problems were and what still may have to happen in order to achieve an improved level of fiscal equity. This is a historical case study that will consider the events over a 30-year duration.

The study is significant because it takes an historical and critical approach by involving the primary players who established and maintained educational policy from 1970 until 2000 in light of the various public documents that speak to the policies. Therefore, the understanding of the changes through these sources should provide the basis to know "where we have been and where we may go in the future" with respect to fiscal equity in the Province of Alberta.

The Purpose

The purpose of the study is to examine and document the evolution of fiscal equity in public school funding from 1970 to 2000. A second purpose is to gain an understanding of the reasons that made fiscal equity an issue that the Progressive Conservative Government addressed and to speak to the evolution of the concept of fiscal equity during the same time period. Third, knowing how and why the concept of fiscal equity changed over 30 years could inform future directions for the Alberta provincial government in achieving better fiscal equity arrangements for public education.

Data Collection and Analysis

Data will be collected by reviewing provincial government documents and the related commentary found in the press. From that information, interviews will be conducted with key individuals in the provincial government where questions will be asked of them about the fiscal equity experienced in Alberta's public education system during their tenure in Cabinet. The interviews will be audio taped and then transcribed. The researcher will analyze the interview and make a summary of it. The transcription and the summary will be shared with the individual interviewed requesting that they review the documents and make changes and clarification. The analysis that finds its way into the dissertation will not be anonymous since the individuals being interviewed are easily identified as they were and still are considered to be public figures.

APPENDIX E:

INTERVIEW QUESTIONS FOR FORMER MINISTERS OF EDUCATION

Appendix E: Interview Questions for Former Ministers of Education

1. How did your administration define fiscal equality and equity in education?
2. What were the characteristics of the funding that was provided for education during you time as a MLA and particularly during the time you were appointed to Cabinet as Minister of Education?
3. How did your administration come to its conclusions about the funding and its effect on equality and equity?
4. What were the defining circumstances that brought about changes that were made (e.g. discussions, studies, outside influences and policy directions)?
5. Did the definition of fiscal equality and equity change during your administration? If so, how did it change?
6. What were the measures that your administration took to ensure that fiscal equity was experienced by school jurisdictions (and students) across Alberta?
7. In your view, how effective was the (1999/ 2000) funding formula in achieving equitable funding arrangements for the delivery of the education required for each student in Alberta as defined by curricular expectations? How did it address the question of adequate funding?
8. Where could the (1999/2000) formula be improved to achieve a better level of equality and equity for each student, regardless of where they attend school in Alberta?

APPENDIX F:

INTERVIEW QUESTIONS FOR DEPUTY MINISTERS AND OTHER GOVERNMENT OFFICIALS

Appendix F: Interview Questions for Deputy Ministers and Other Government Officials

1. What has your experience been in education (e.g. superintendent, teacher, university study and academic work)?
2. During this time how was fiscal equality and equity defined Alberta's public education system?
3. What were the fiscal equity characteristics of the funding that was provided for education during your time as Deputy Minister Alberta Education?
4. How did the administration come to its conclusions about the funding and its effect on equality and equity?
5. What were the defining circumstances that brought about changes that were made (e.g. discussions, studies, outside influences and policy directions)? Did the definition of fiscal equality and equity change during your time with Alberta Education? If so, how did it change?
6. What were the measures that the administration took to ensure that fiscal equity was experienced by school jurisdictions (and students) across Alberta?
7. In your view, how effective was the (1999/2000) funding formula in achieving equitable funding arrangements for the delivery of the education required for each student in Alberta as defined by curricular expectations? How did it address the question of adequate funding?
8. Where can the current funding formula be improved to achieve a better level of equality and equity for each student, regardless of where they attend school in Alberta?

APPENDIX G:

TERMS USED IN THE RESEARCH OF FISCAL EQUITY AND SHARED WITH THE INTERVIEWEES

Appendix G: Terms Used in the Research of Fiscal Equity and Shared With the Interviewees

Egalitarianism: an affirmation of, the promotion of, or characterized by the belief in equal political, economic, social, and civil rights for all people.

Equality: the provision of the same level of funding per student or classroom unit, as the case may be. The funding is distributed to each school jurisdiction, regardless of the students' profiles and individual circumstances.

Equal opportunity: results from fiscal neutrality. Berne and Stiefel (1984) maintained that equal opportunity exists when "there [is] no relationship between expenditures, resources, programs, outcomes, and per-pupil wealth or fiscal capacity" (p. 17).

Fiscal neutrality: "All children regardless of their social or cultural background or the wealth of the community in which they live, must have equitable opportunities to get the education they need" (Alberta Education, 1991, p. 25).

Horizontal equity: assumes that students who are alike should be treated alike. It assumes that given the same quantity of fiscal resources all students will have an equal educational opportunity (Darby, 1993, p. 29).

Vertical equity: recognizes differences in children. Unequal treatment of unequals suggests that it is acceptable to treat students differently in certain instances. Examples would be children with physical or mental handicaps (Darby, 1993, p. 30).

Equity of outcomes: "Equity is beginning to be addressed in terms of educational outcomes, not just dollars" (Clearinghouse on Educational Policy and Management, 1999, ¶ 1)

APPENDIX H:

AMENDED ALEXANDER MODEL TO EVALUATE EQUITY

Appendix H: Amended Alexander Model to Evaluate Equity

			Hyndman	Koziak	King	Betkowski	Dinning	Jonson	Mar
		Outcome equity							
		Output equity for students							
Positivism		Link schools and social agencies							
		Supplemental standards							
		Programs for individual							
		Full funded remedial							
		Adequate funding							
		Remedial programs							
	Restitution	Cost of delivery							
		Fiscal neutrality							
		Uniform tax effort							
		Municipal overburden							
		Economies of scale							
		Adjust for regional cost							
		Full state funding							
		Corrective socio economic							
Distributive		Remedial system							
		Corrective govt. design							
		Public intervention							
	Commutative	Unlimited local effort							
		Local choice to property							
		Local leeway							
		Ability to pay and receive service							

APPENDIX I:

2004-2005 SAMPLE SCHOOL YEAR JURISDICTION FUNDING PROFILE

Appendix I: 2004-2005 Sample School Year Jurisdiction Funding Profile

2004-05 SCHOOL YEAR JURISDICTION FUNDING PROFILE

Clearview School Division No. 71

FUNDING CATEGORY	RATE	ENROL	FUNDING
Base Instruction			
Early Childhood Services (ECS)	$ 2,482	171.8	$ 426,470
Grades 1-9	$ 4,963	1,754.8	$ 8,709,010
Grades 10-12 Credit Enrolment Units (CEU)	$ 141.80	25,188.3	$ 3,571,699
Outreach Locations	$ 52,020	2.0	$ 104,040
Home Education			
Grades 1-12	$ 1,241	4.0	$ 4,902
ADLC	-	-	$ -
Severe Disabilities	$ 14,415	59.7	$ 860,697
English as a Second Language / Francisation	$ 1,020	189.7	$ 193,641
Enhanced ESL and Support Services for Immigrant Students	$ 357	7.1	$ 2,550
First Nations, Mètis and Inuit Education	$ 1,020	89.9	$ 91,720
Socio Economic Status (SES)	$ 408	421.4	$ 172,095
ECS Mild/Moderate Special Needs	$ 2,153	2.0	$ 4,309
Enrolment Growth			
Jurisdiction Growth	$ 552	-	$ -
School Growth	$ 552	18.0	$ 9,925
Enrolment Decline			
Jurisdiction Decline	$ 3,723	29.2	$ 108,619
School Decline	$ 552	25.1	$ 13,855
Small Board Admin	-	-	$ 178,520
Northern Allowance			
Lower Zone	$ 408	-	$ -
Intermediate Zone	$ 612	-	$ -
Upper Zone	$ 918	-	$ -
Intrajurisdiction Distances	$ 1.02	-	$ 42,409
Small Schools by Necessity	-	-	$ 1,019,900
Program Unit Funding	-	-	$ 70,480
Learning Resources Credit	-	-	$ 27,015
Regional Services	-	-	$ -
Institutional Support	-	-	$ -
Transportation	-	-	$ 2,087,370
Relative Cost of Purchasing Adjustment (RCPA)	-	-	$ -
Stabilization Funding	-	-	$ 456,071
Rural Transportation Review Committee Funding	-	-	$ 356,629
Profile Subtotal			**$ 18,511,926**
Alberta Initiative for School Improvement (AISI)	$ 123	-	$ 319,680
Student Health	-	-	$ 1,068,377
High Speed Networking	-	-	$ -
Total 2004-05 Jurisdiction Funding			**$ 19,899,983**

2003-04 Funding (budget to budget - excludes November funding announcement)	-	$ 19,045,948
2003-04 Funding (budget over forecast - includes November funding announcement)	-	$ 19,491,948
2004-05 Funding (assuming no enrolment change)	5.6%	$ 20,120,017
*** 2004-05 Funding (based on board provided projected enrolment)**	**4.5%**	**$ 19,899,983**

* All boards will receive a minimum increase in funding of 2%. Any percentage, less than 2%, is directly attributable to enrolment decline. School jurisdictions provided estimates of their 2004-05 student information which have been used to determine 2004-05 Jurisdiction Funding. These figures are estimates. Enrolment and funding rates have been rounded for presentation purposes.